Munis

Munis

New User Information

Accessing Munis on Your Computer

Before you begin using Munis, follow these steps to place a shortcut on your desktop for future access.

Getting to this tutorial

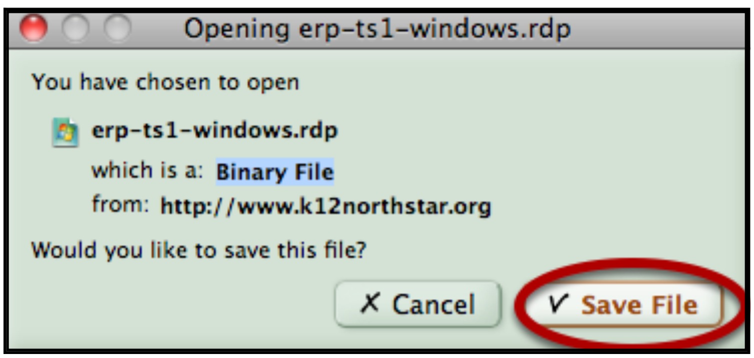
1. Log in www.k12northstar.org using your f-number and password.
2. Click on the **Munis** link (lower left, under Useful Links).
3. Click on the New User tutorial called Accessing Munis on Your Computer.

Download the appropriate file for your computer operating system

Download for Macs

Download for Windows

Save the file

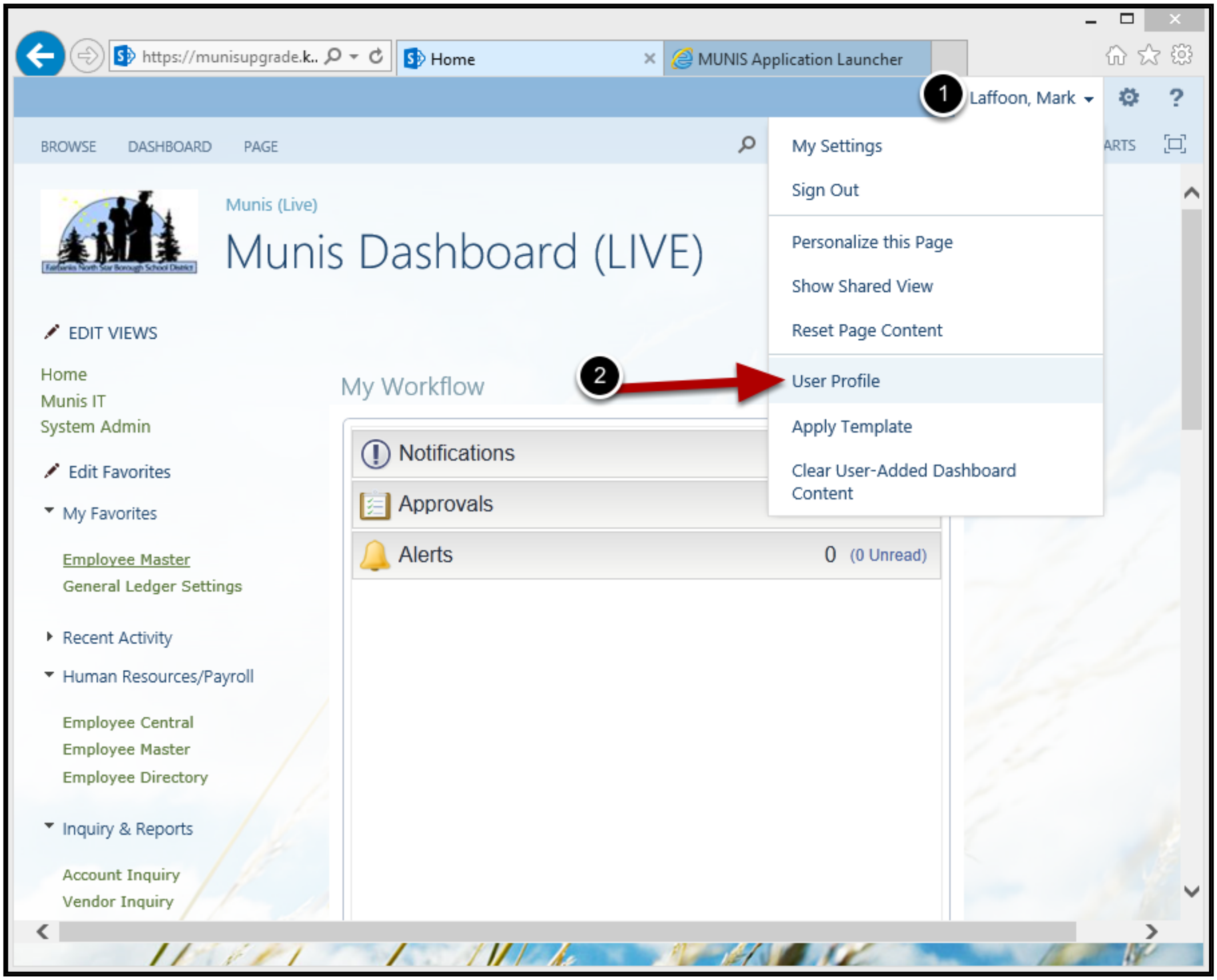


PC users: If the file does not save automatically to your desktop, find it in your downloads and drag it to your desktop.
Mac users: If the file does not save automatically to your desktop, open your downloads folder or the downloads manager and drag the Remote Desktop file to your computer desktop.

Your Munis v10.5 user profile and settings

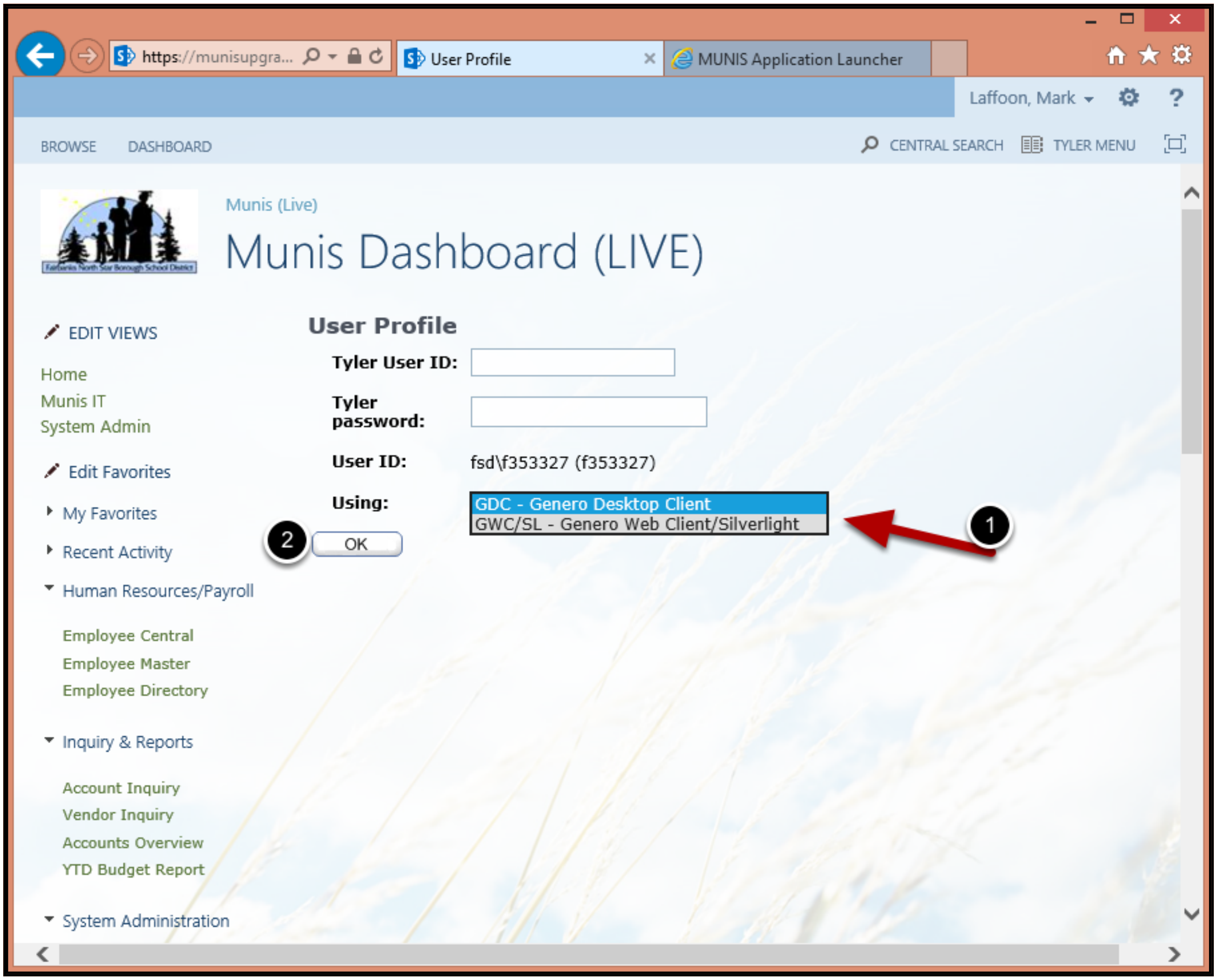
New versions of Munis use the "Web Client" by default. If you prefer the "Desktop Client" (it's the one you're used to), follow these steps...

Finding My User Profile



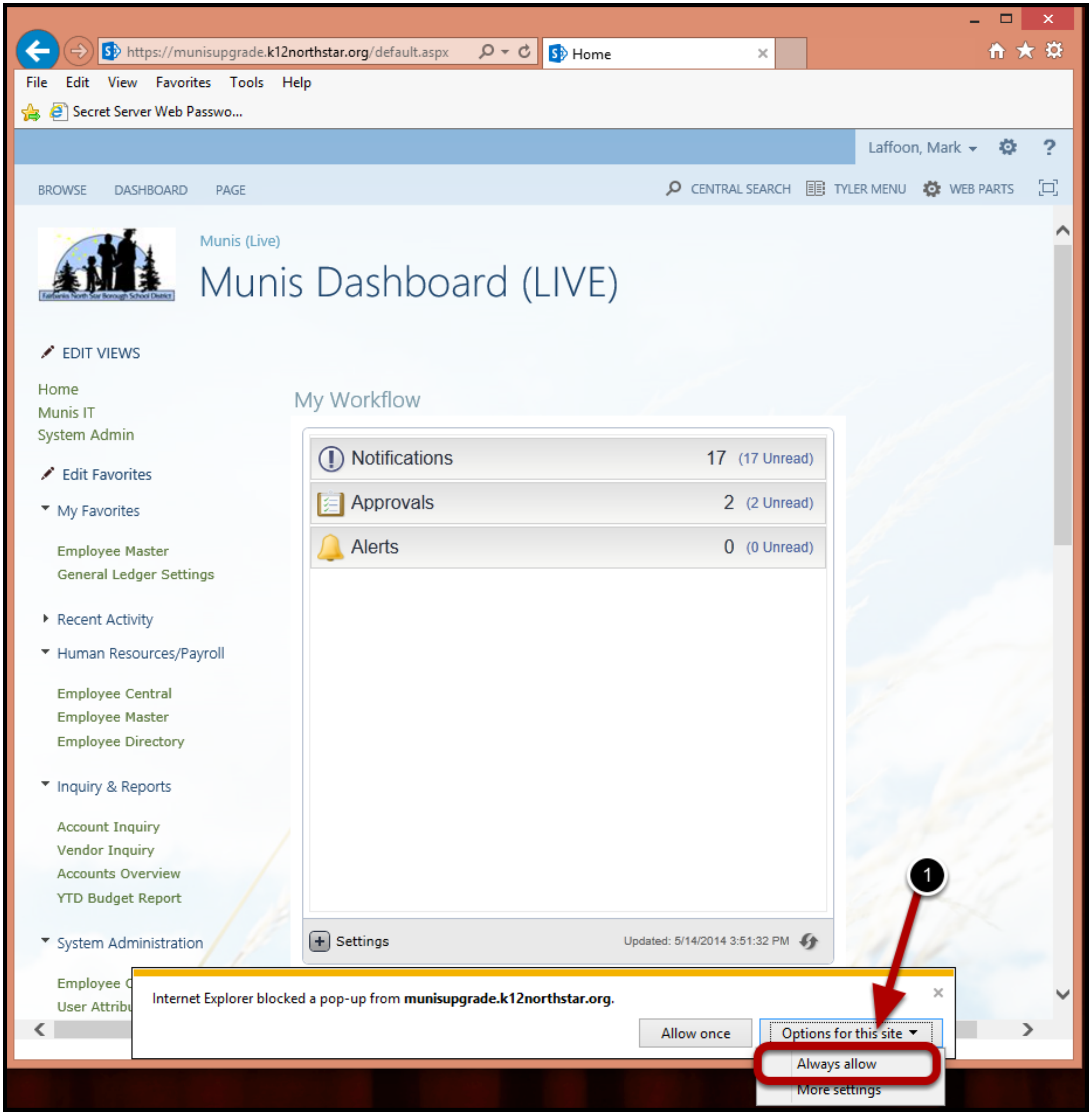
1. Click on your name
2. Select "User Profile"

GDC or GWC



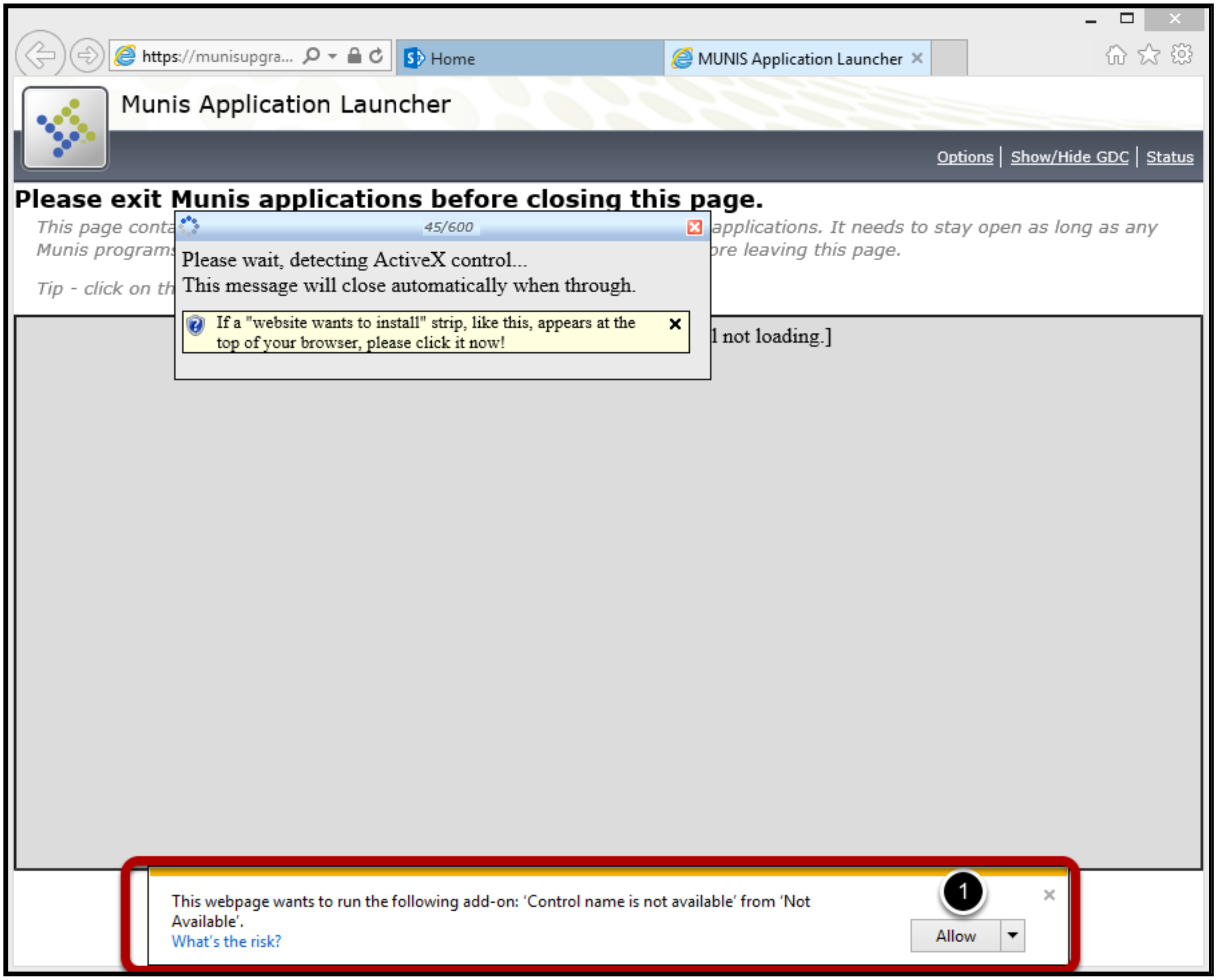
1. Make your selection, either GDC or GWC
2. Click "OK"

Allow Pop-ups



1. To allow pop-ups, select "Options for this site" and click "Always allow"

ActiveX

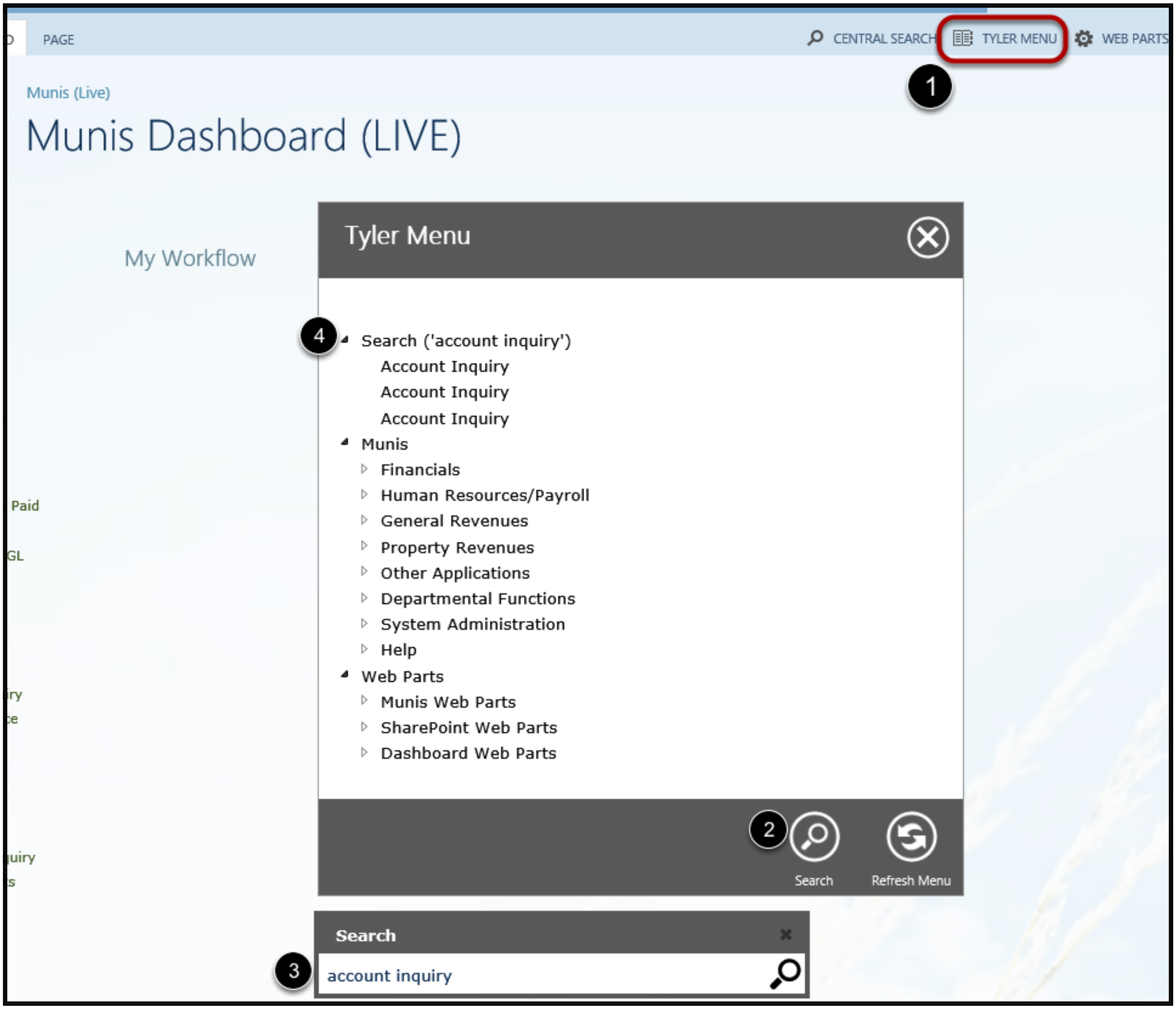


1. New versions of Munis means new ActiveX! Click "Allow" to update the GDC.

Munis Menus

Menus are divided by Munis products, and then by applications within those products. For example, Financials is a product, and Accounts Payable is an application within that product.

Tyler Menu - Search for programs



1. Tyler Menu

There are two options to find menus. Drill down into the menus or

2. Select search

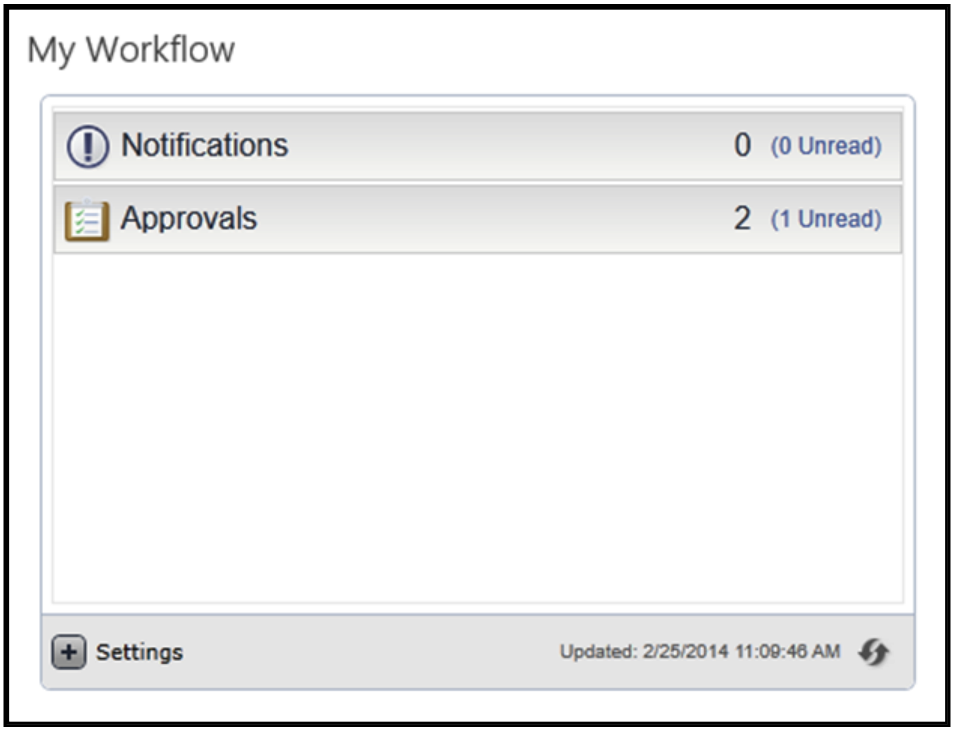
3. Type the menu you are looking for

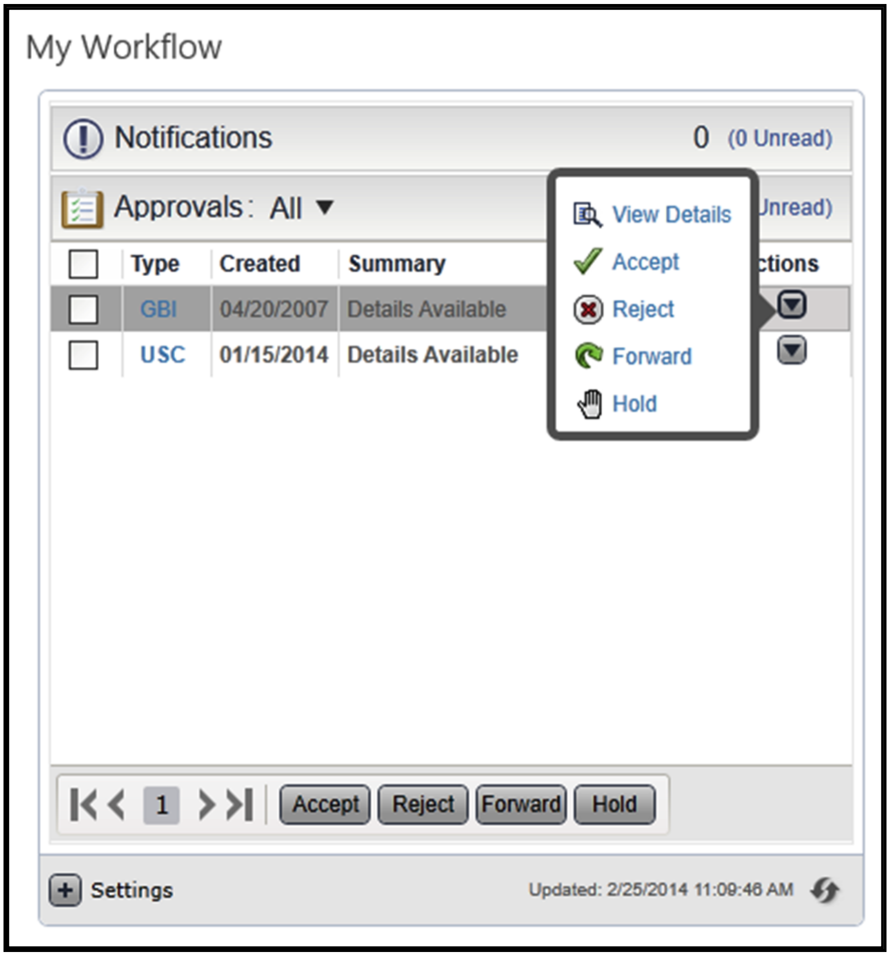
4. Open up the search results

You can right click to add it to your favorites or just open the menu

My Workflow

The My Workflow web part displays the number of Workflow approvals, notifications, and alerts you currently have pending. Use the web part to approve or deny workflow items and to acknowledge workflow notifications. You can also turn on Workflow forwarding from this web part.



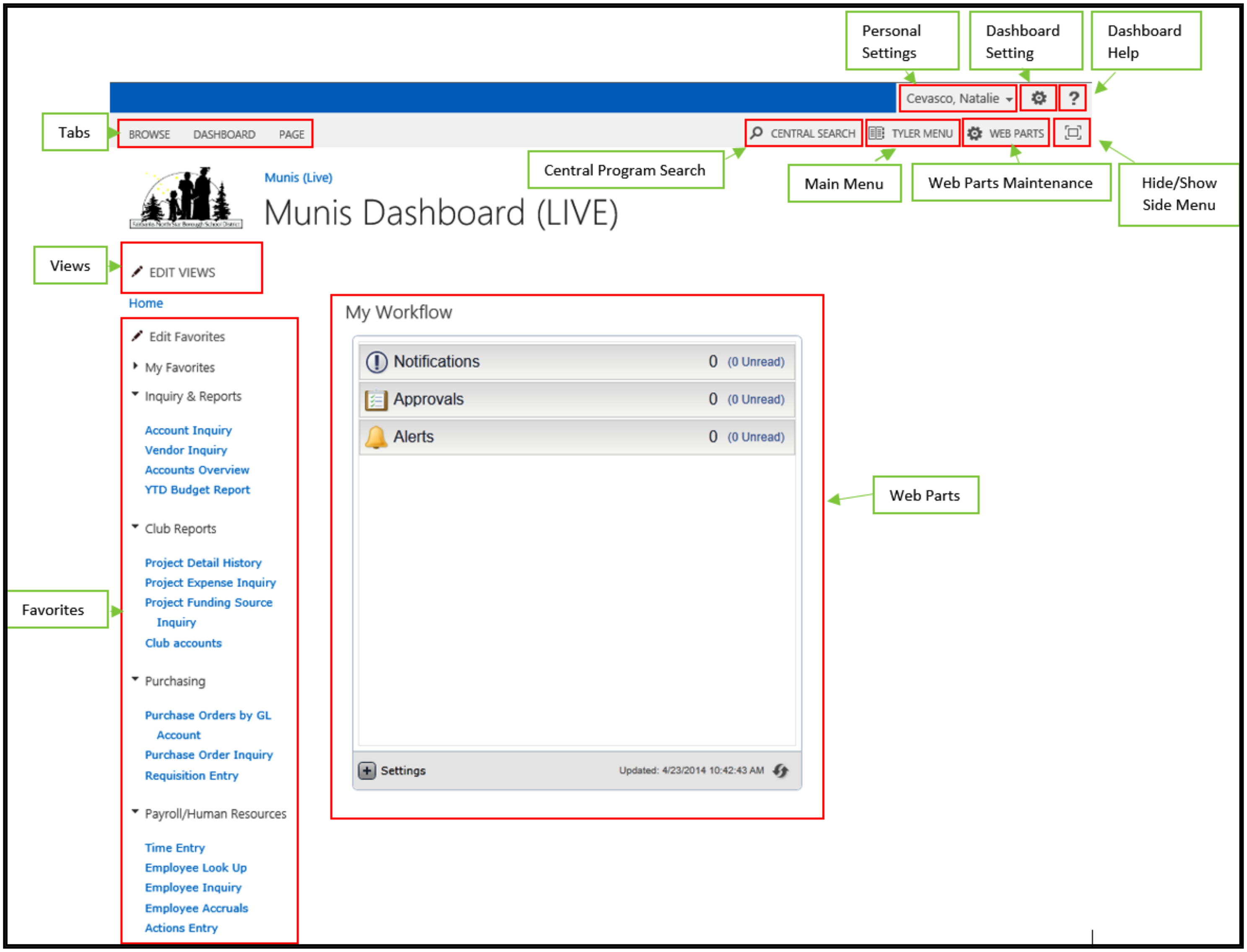


When you click Notifications or Approvals, the group expands to show each item in the category. To process the workflow items, select the check boxes for the applicable items and then use the Accept, Reject, Forward, or Hold buttons to complete the action.

The View Details option on the Actions menu provides the item details. On the Details tab, the More Info option, if available, provides the item details in the associated Munis program. The Reason option maintains the hold or rejection reason.

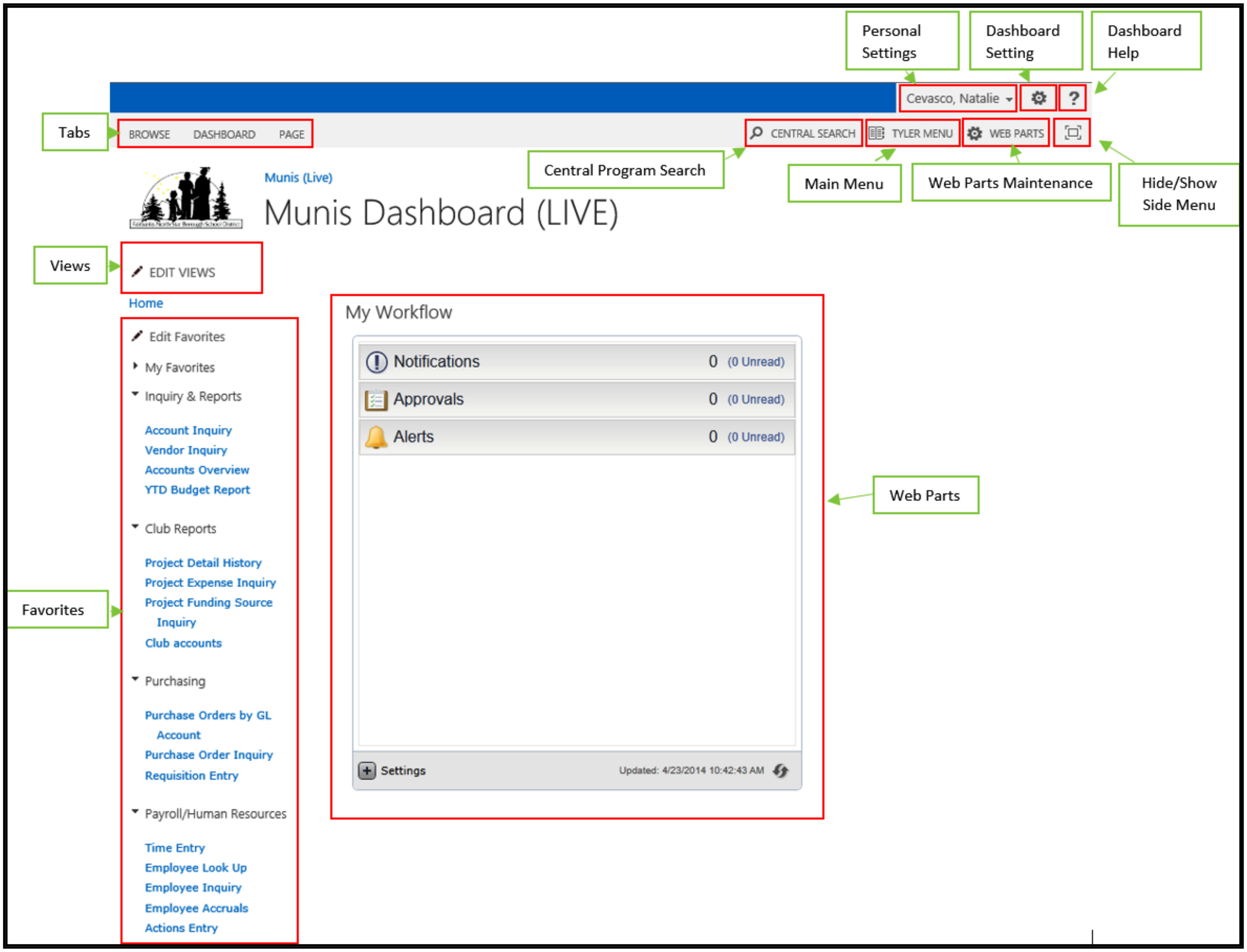
Dashboard Overview

This is an example of the Tyler Dashboard with Web parts already added.

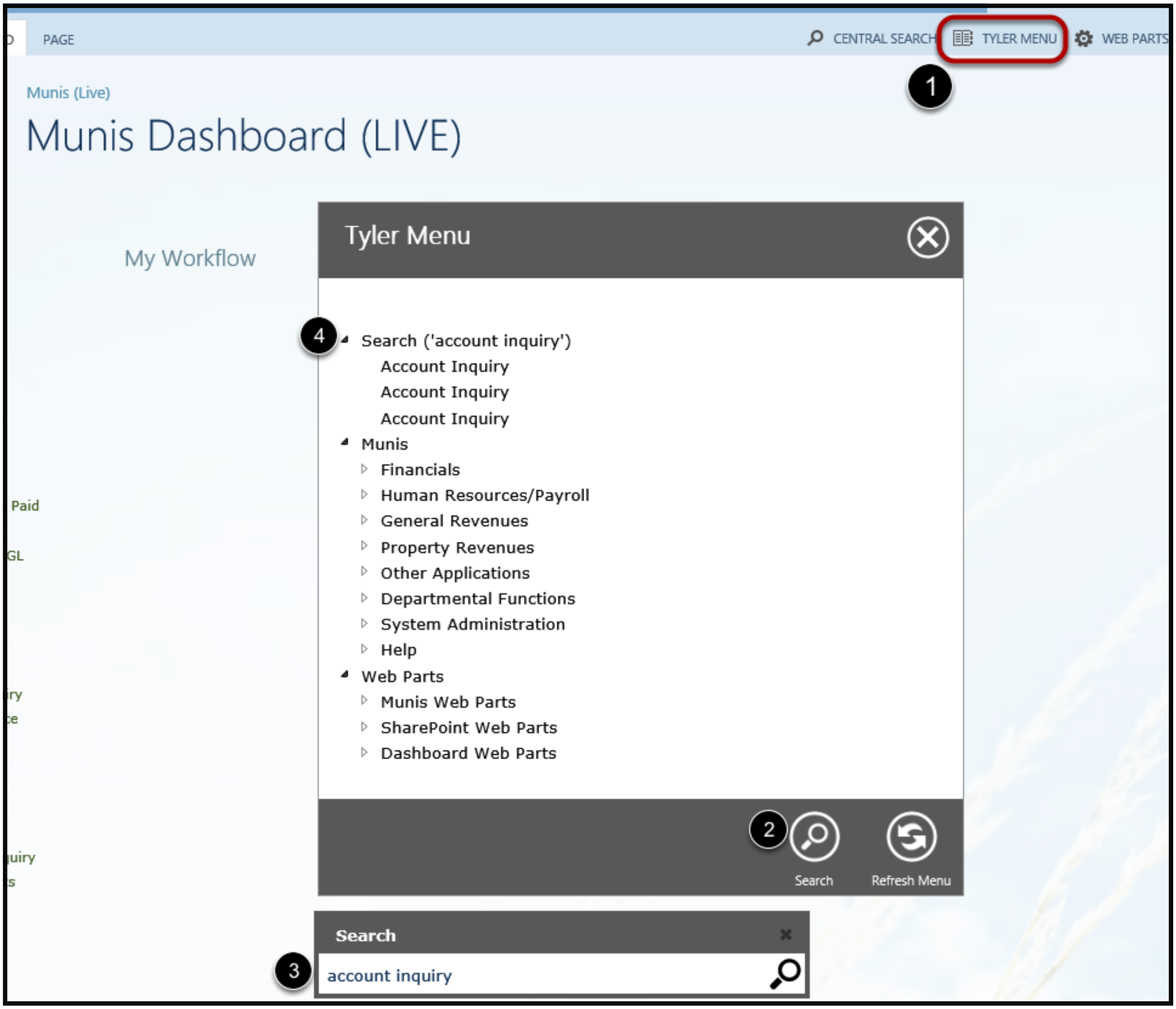


Munis v10.5 Dashboard

10.5 Dashboard



Tyler Menu - Search for programs



1. Tyler Menu

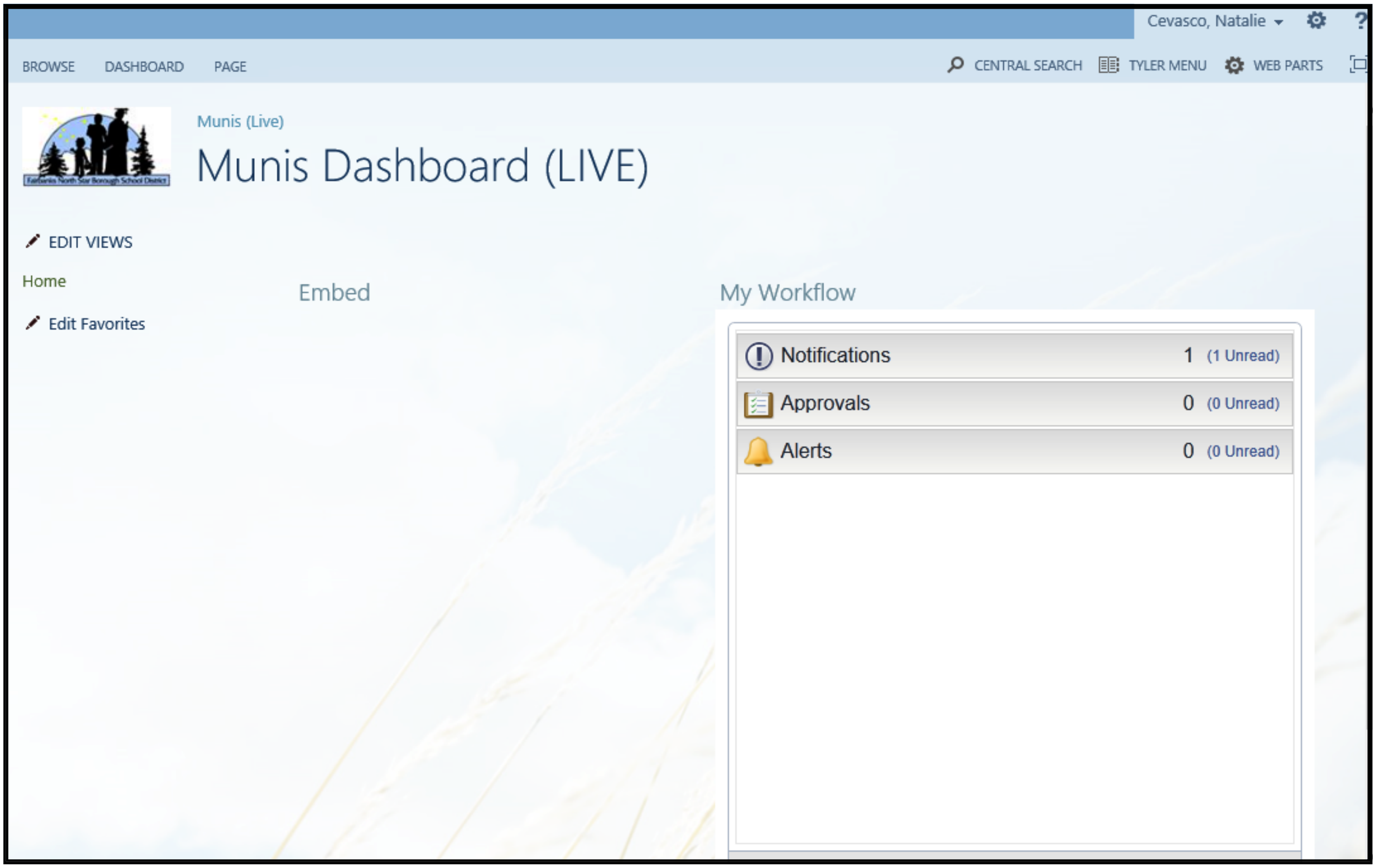
There are two options to find menus. Drill down into the menus or

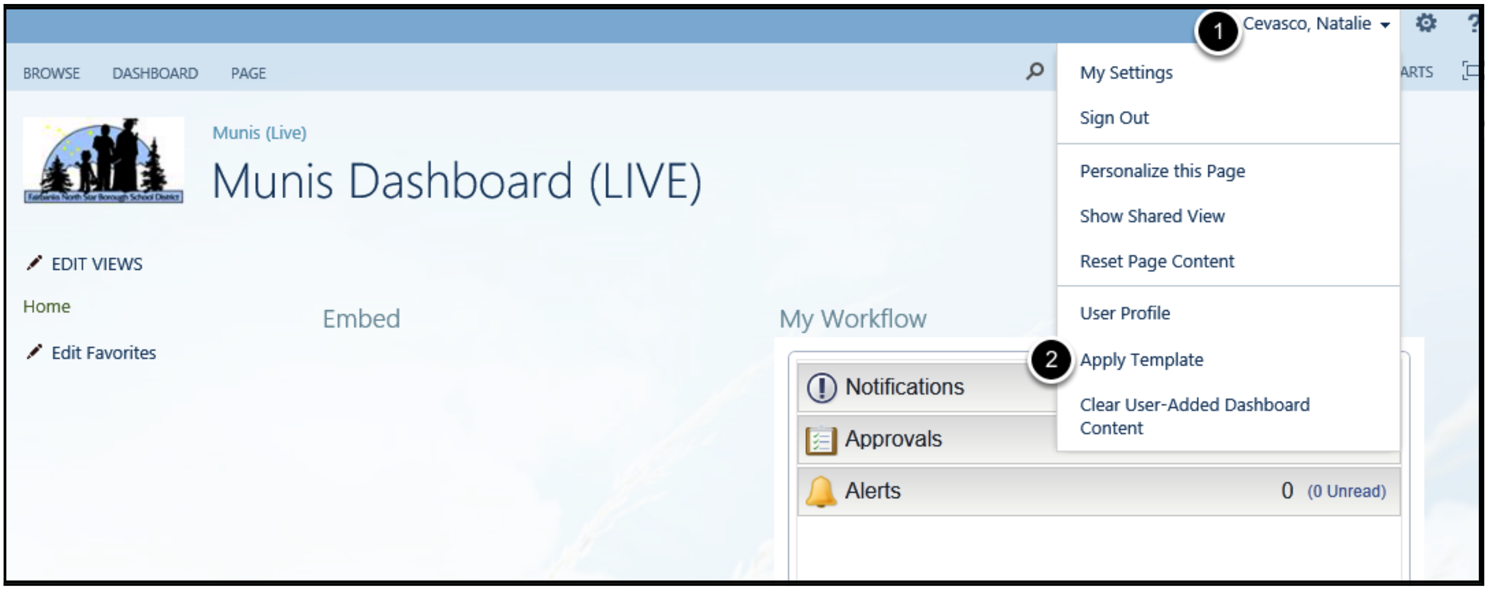
2. Select search
3. Type the menu you are looking for
4. Open up the search results

You can right click to add it to your favorites or just open the menu

Dashboard v10.5 - Apply a Template

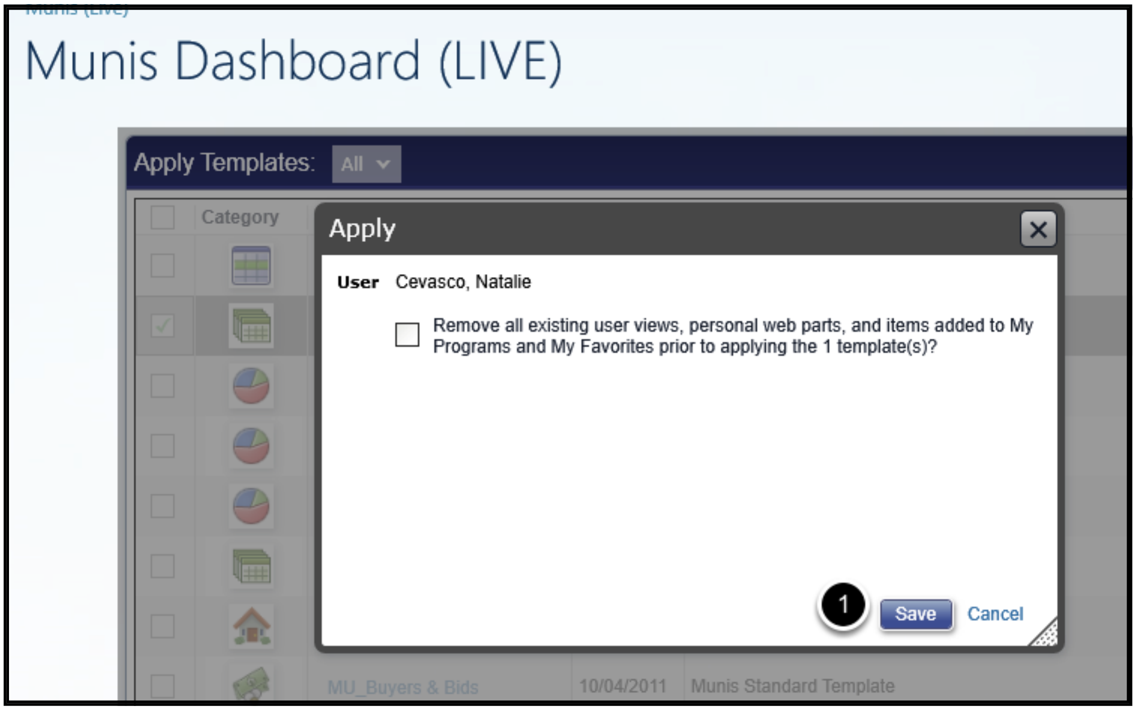
The first time you log into Munis your screen should look similar to the snapshot below. Your favorite programs do not come over with the new upgrade. We have created templates to add back the basic menus. Please follow the instructions below.





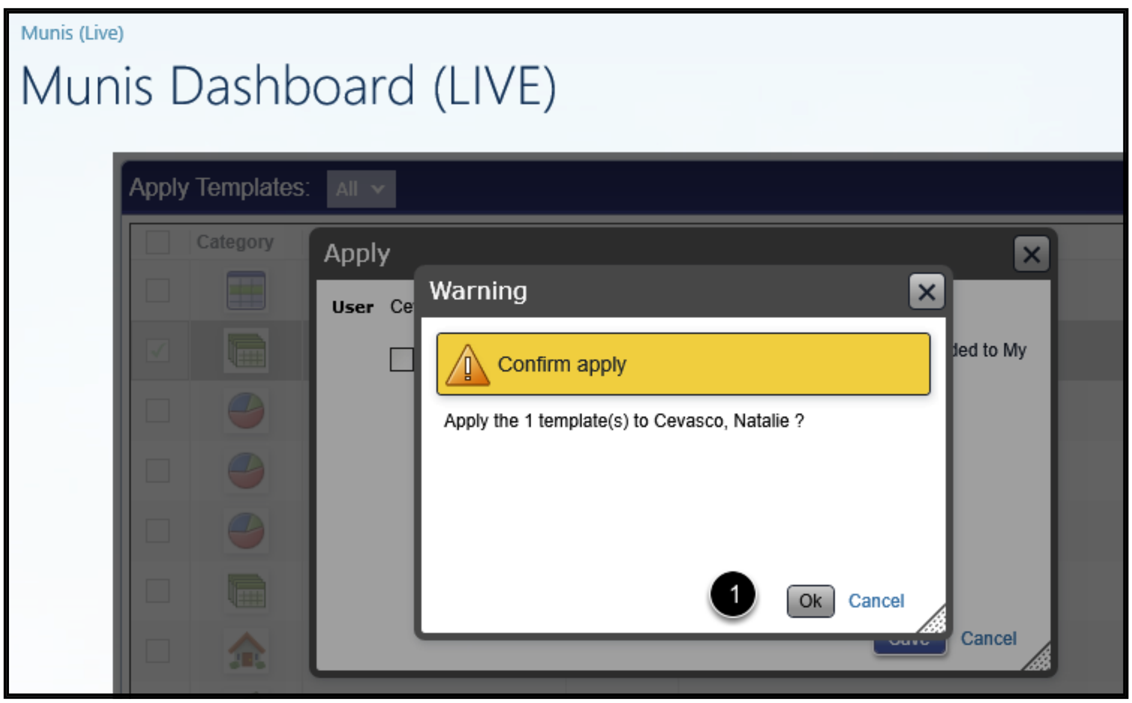
1. Click on your name.
2. Select Apply Template

1. Check the appropriate template.
2. Click Apply

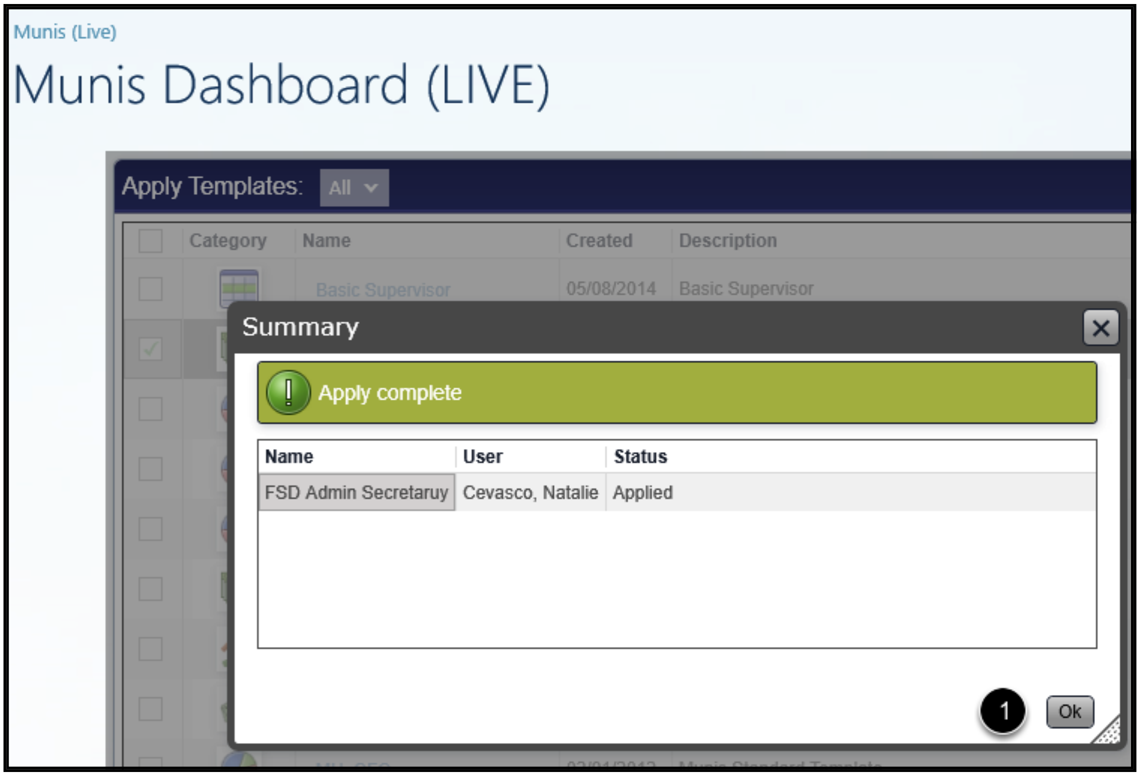


You do not need to select the check box, because your dashboard should be empty. If you had items that you wanted cleared, you could check the box to clear it.

1. Click Save

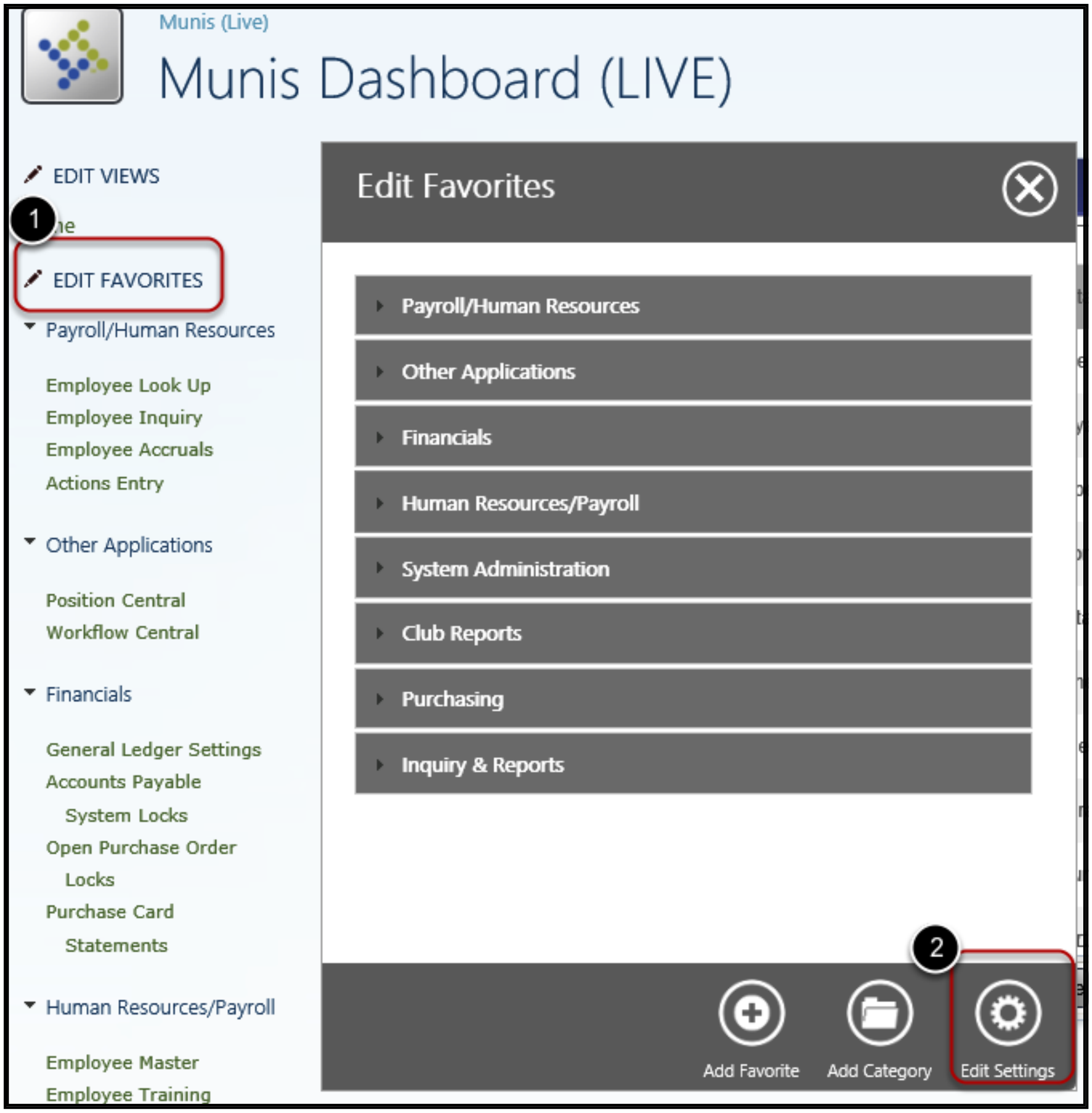


1. Click OK

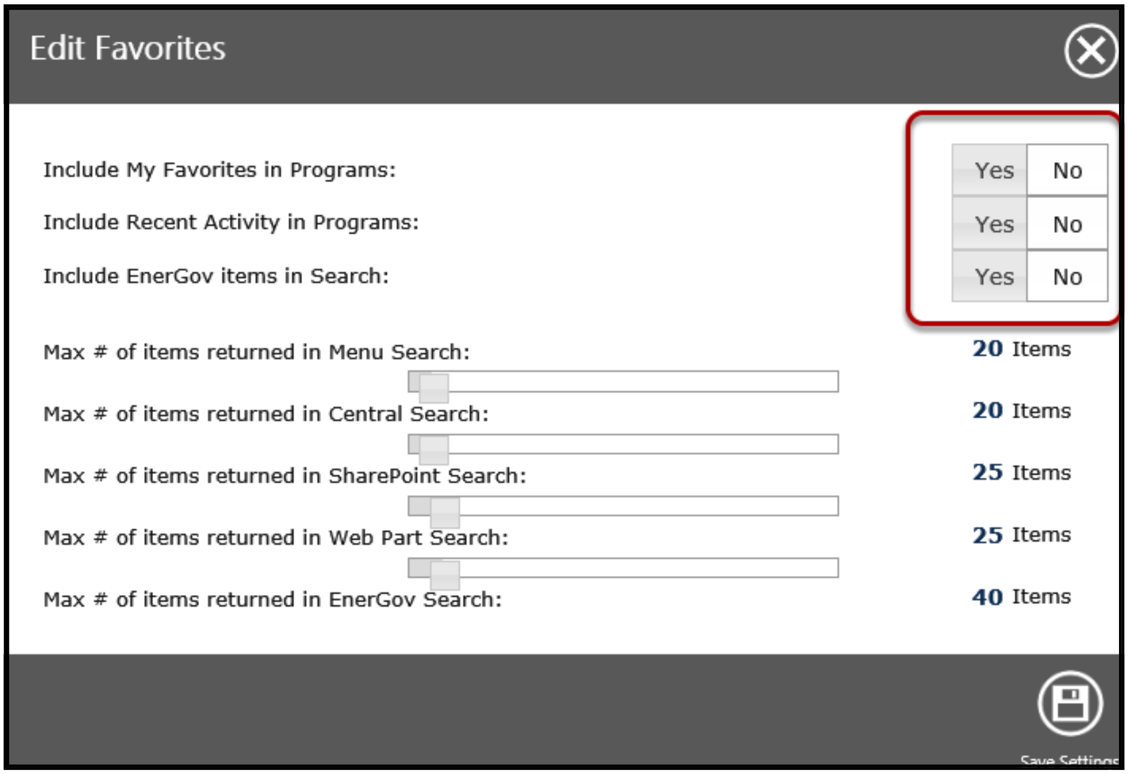


You should receive a confirmation that the template was applied.

1. Click OK and click the district logo to see your new dashboard.



Now you need to edit your favorites.
1. Select "Edit Favorites"
2. Then at the very bottom of the window, select "Edit Settings"

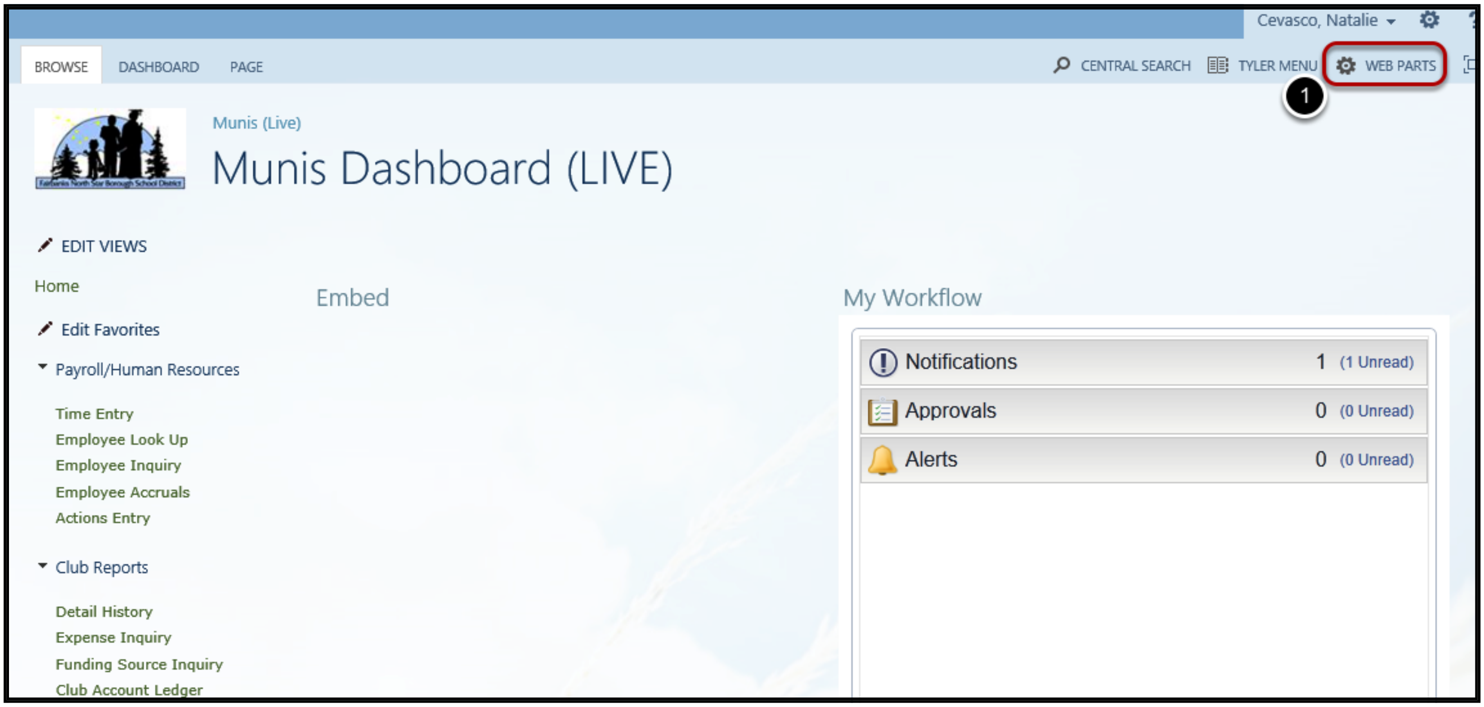


Click No for all the items in the red box and then save settings.

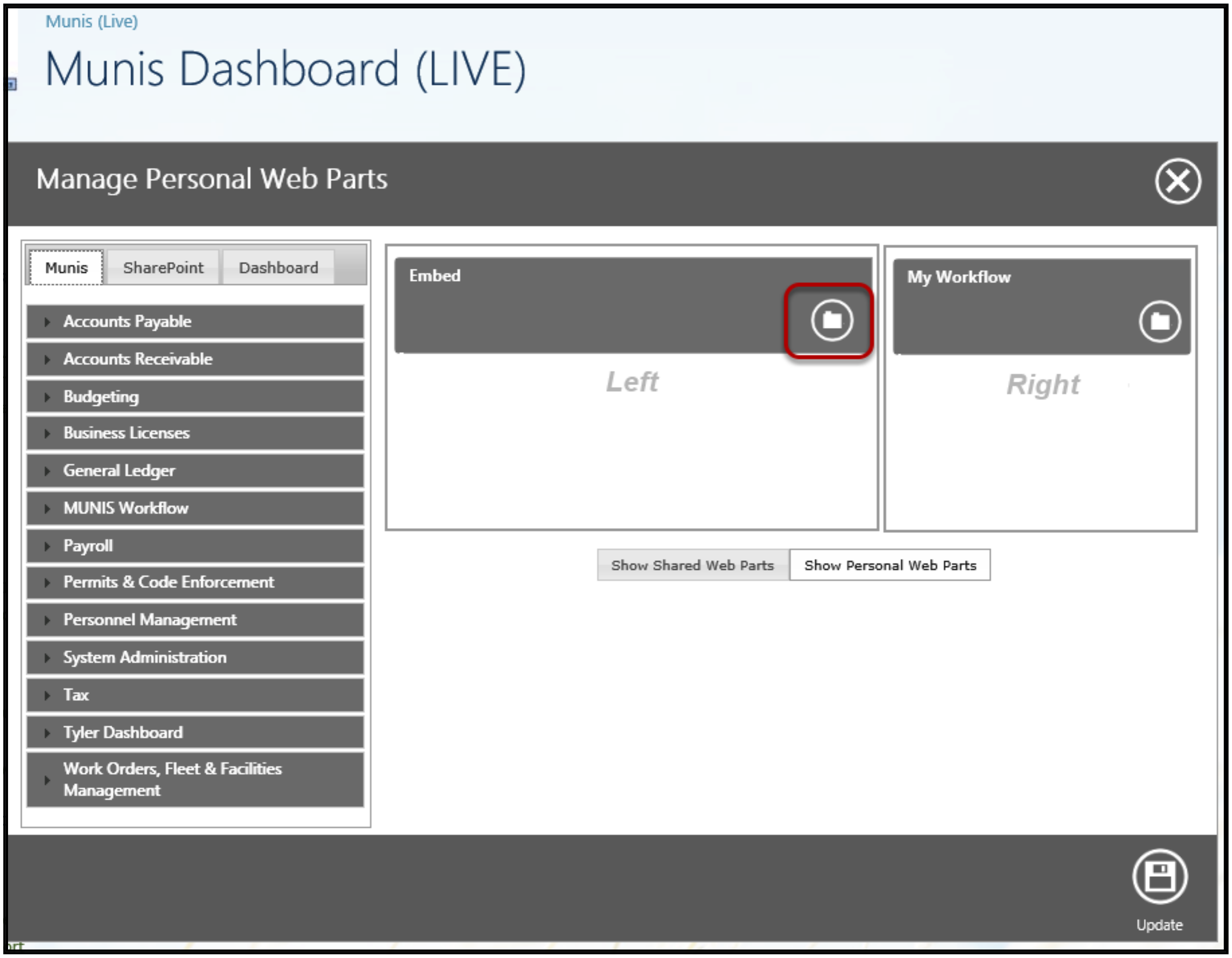
Click the district Logo and it will refresh your home page.

Dashboard v10.5 - Web Parts

You have the ability to customize your dashboard web parts. You can have certain web parts open or closed and you can drag and drop them to orient them on your dashboard.



1. Select Web Parts

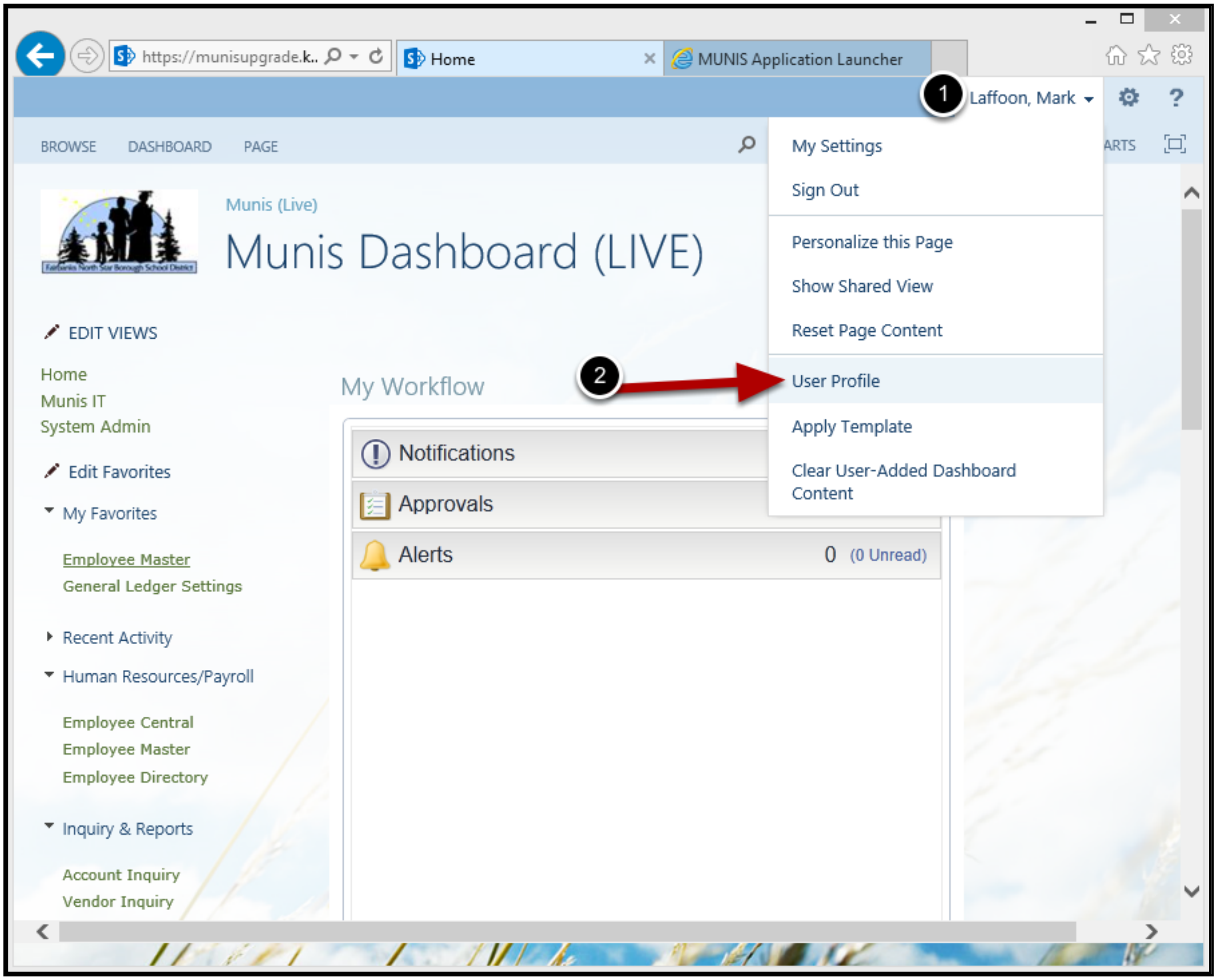


Selecting the folder allows you to open or close a web part. You can drag and drop the web parts to move them on your dashboard.

Your Munis v10.5 user profile and settings

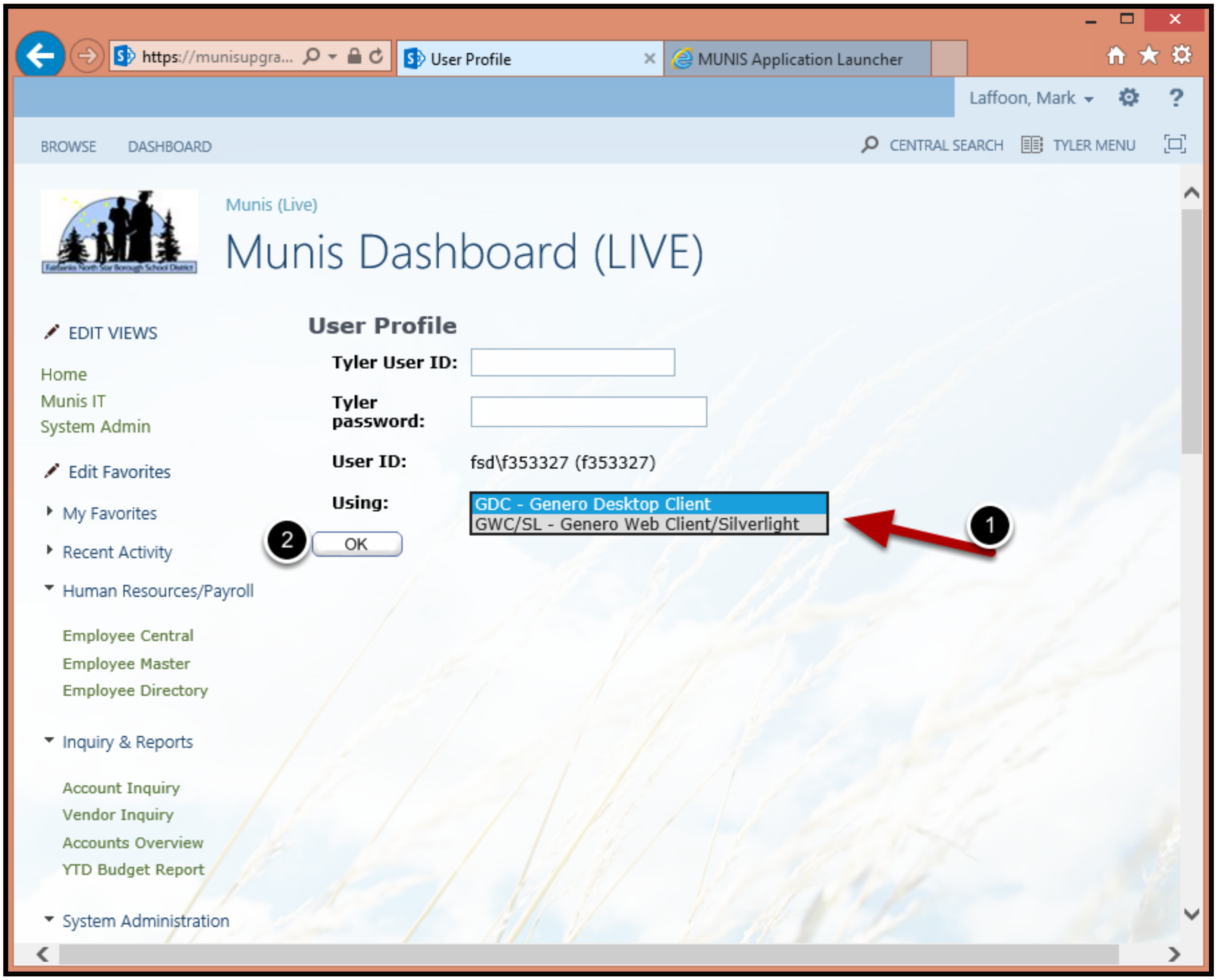
New versions of Munis use the "Web Client" by default. If you prefer the "Desktop Client" (it's the one you're used to), follow these steps...

Finding My User Profile



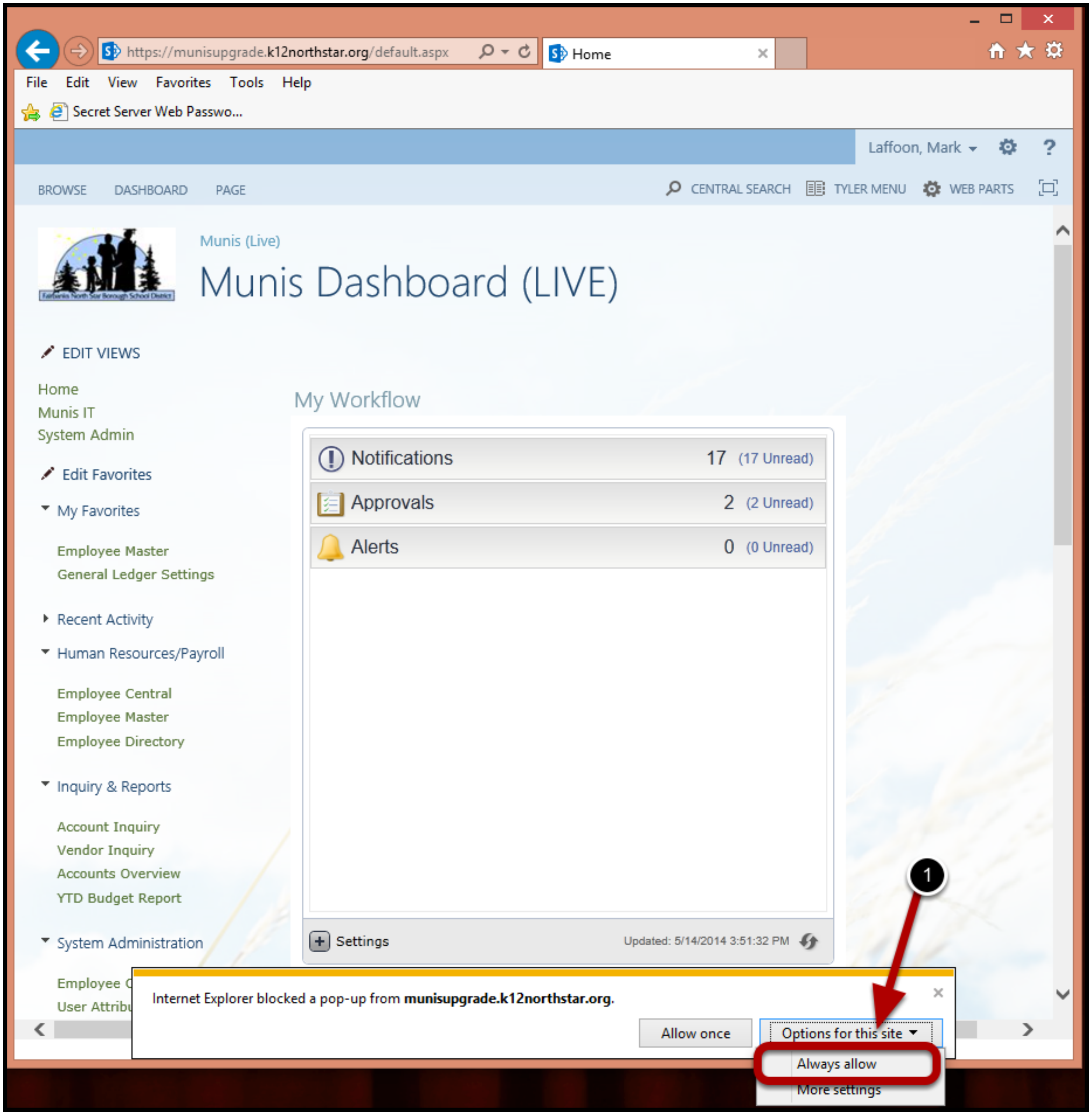
1. Click on your name
2. Select "User Profile"

GDC or GWC



1. Make your selection, either GDC or GWC
2. Click "OK"

Allow Pop-ups



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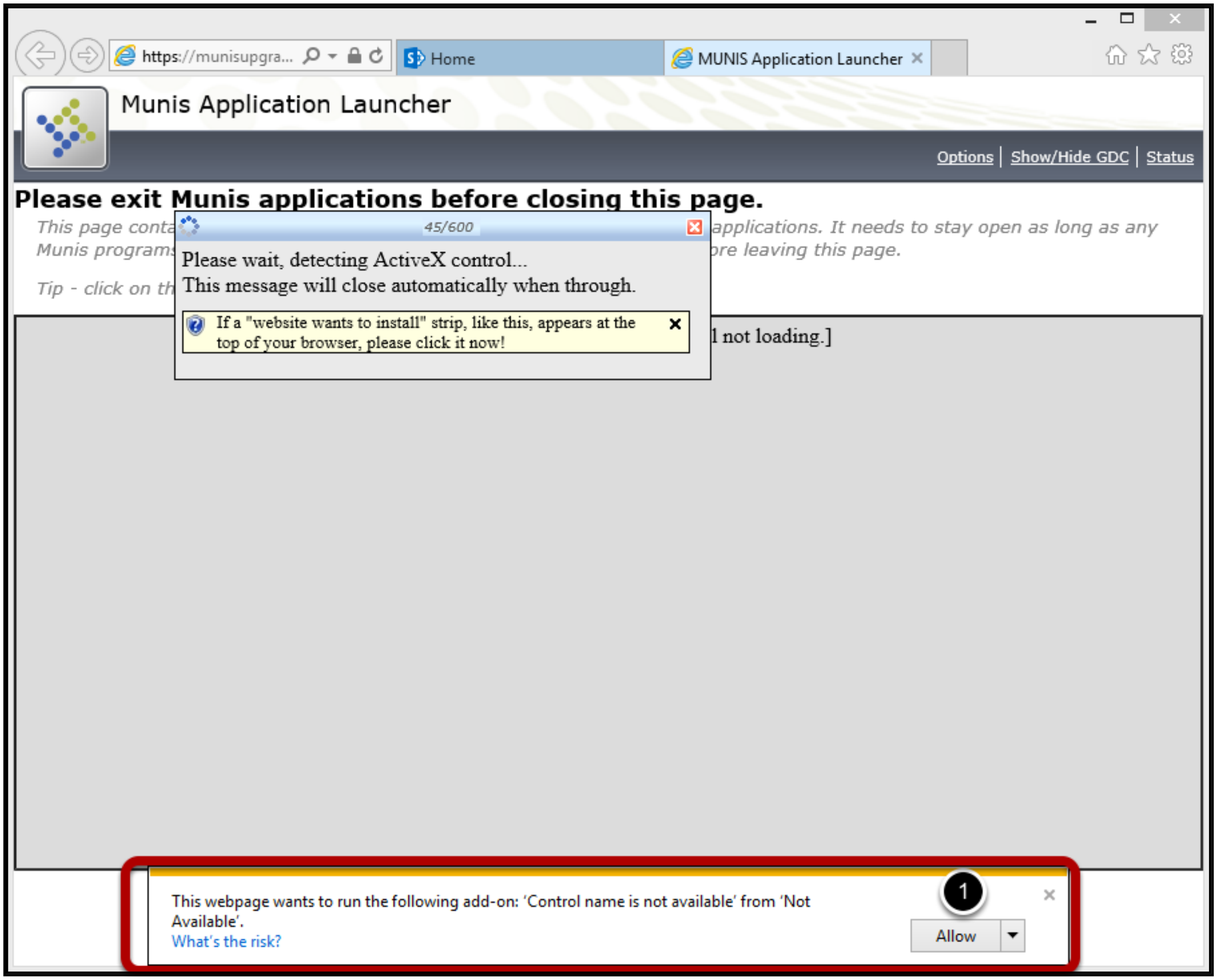
ActiveX



1. New versions of Munis means new ActiveX! Click "Allow" to update the GDC.

User Guides

User Guides

These **Munis User Guides** were distributed during the initial Munis training.

Munis User Manual

General Ledger Manual Overview

Purchasing Manual

- Updated 3-8-2-12

Invoice Approval Manual

- Updated 3-22-2012

Personnel Actions Procedures for Schools and Departments

- Updated 4-17-2013

Payroll Time and Attendance Manual

User Guide Addenda

These items were contributed by individual departments as supplementary instructions.

Project String Inquiry

- Contributed by Nichole Wood, Chief Accountant (3-22-2012)

Time Entry Corrections & Substitutes

- Contributed by Valerie Stilipec, Payroll Department

Specific Requisition Instructions

Travel, Blanket PO, Central Stores, etc.

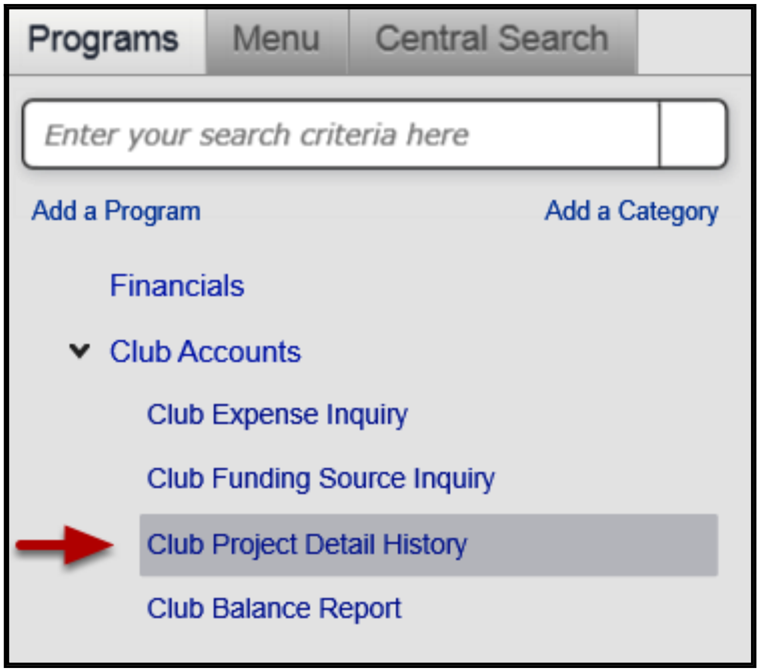
- Contributed by Bart Grahek, Purchasing Department (3-08-2012)

Club Accounts

Club Detail History

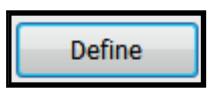
Run a report that will show what has been charged and received in a particular club.

Open Club Detail History



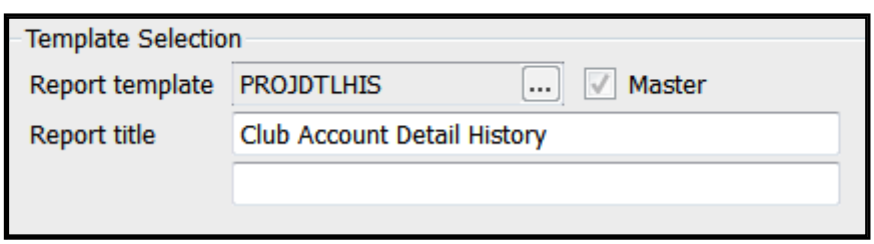
Click on ***Club Detail History*** on the ***My Programs*** sidebar.

Define the report



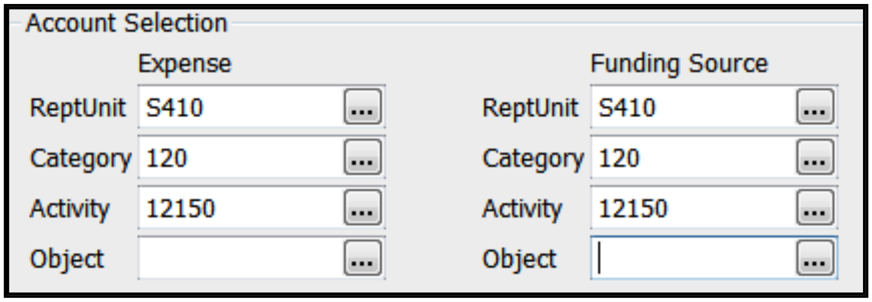
Click on the ***Define*** button.

1. Template Selection



You can change the report title if you wish. This template is a shared template, though. Keep in mind that if you change the report title, the next user (MUNIS-wide) who runs this report will see your report title.

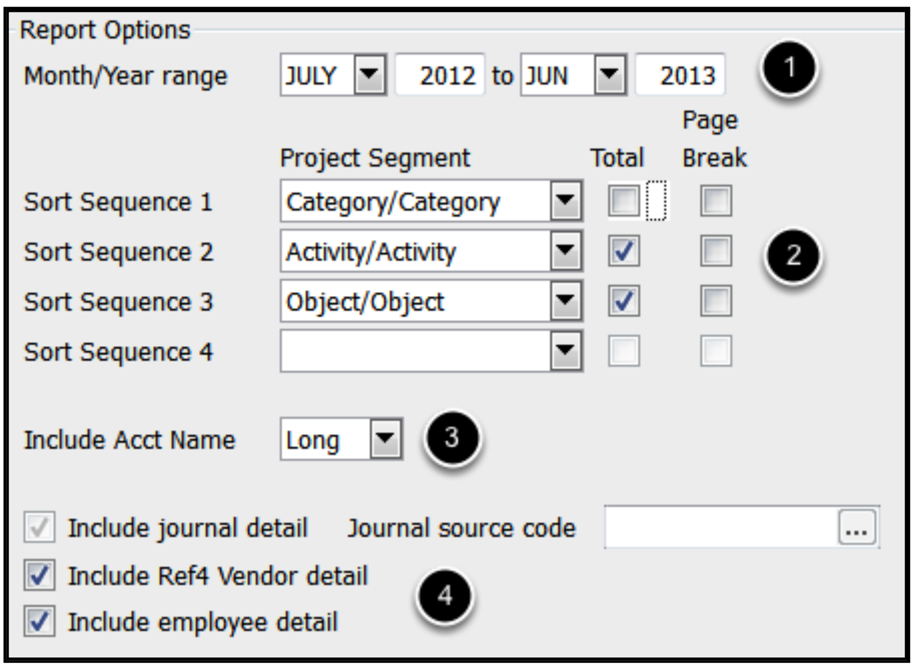
2. Account Selection



Choose the club. If you want to know both what was charged AND what deposits have been received, you must fill out both the ***Expense*** column and the ***Funding Source*** column. You do have the option to do one or the other as well.

Leaving the ***Object*** blank will allow you to get ALL the objects that have had activity.

3. Report Options



1. Choose the date range. I suggest that you always run for the whole fiscal year.
2. Choose the sort sequence.
3. Choose whether you want the ***Long*** account name or the ***Short*** account name. I suggest always choosing ***Long***.
4. Leave these two boxes checked.

Accept

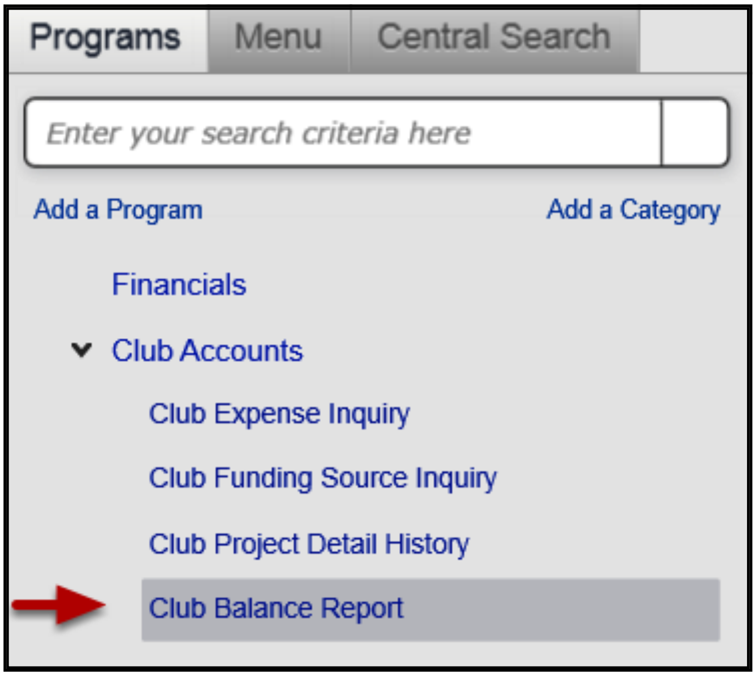
Click on the Green Check Mark to accept, or hit ***Enter***.

Choose your output

Choose how you want to ouput the report. I suggest using the PDF report.

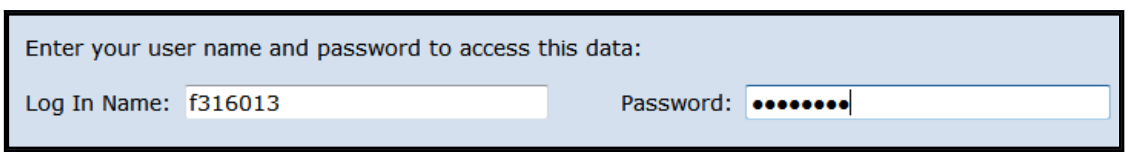
Club Account Balances

How to run the *Club Account Balances* report to get current available balances for your clubs.



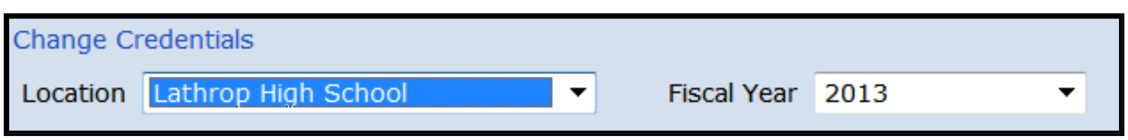
Click on the *Club Account Balances* link on the *My Programs* sidebar. A new window will open in Internet Explorer.

Log In

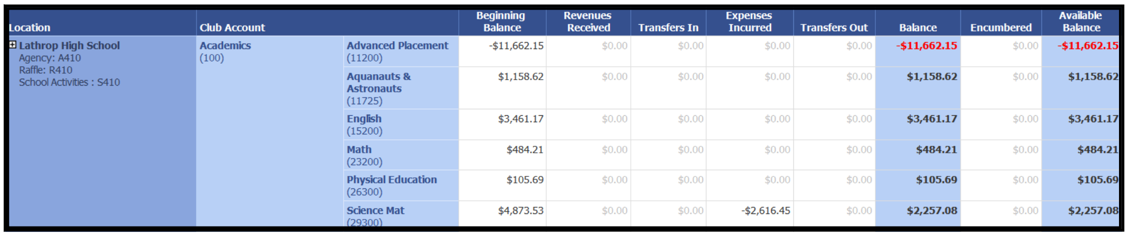


Use your f# and password just like when you log into Munis. Hit Enter.

Choose a Location and Fiscal Year



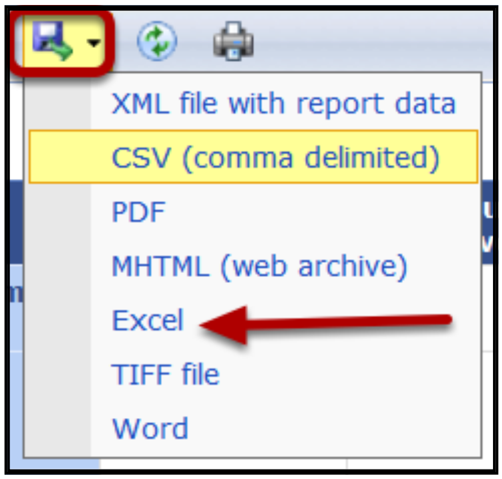
It should default to your location. If it doesn't, you can use the drop down to choose the correct location. Then, choose the fiscal year you would like to see balances for. It will default to the current fiscal year.



Location	Club Account		Beginning Balance	Revenues Received	Transfers In	Expenses Incurred	Transfers Out	Balance	Encumbered	Available Balance
Lathrop High School Agency: A410 Raffle: R410 School Activities : S410	Academics (100)	Advanced Placement (11200)	-$11,662.15	$0.00	$0.00	$0.00	$0.00	-$11,662.15	$0.00	-$11,662.15
		Aquanauts & Astronauts (11725)	$1,158.62	$0.00	$0.00	$0.00	$0.00	$1,158.62	$0.00	$1,158.62
		English (15200)	$3,461.17	$0.00	$0.00	$0.00	$0.00	$3,461.17	$0.00	$3,461.17
		Math (23200)	$484.21	$0.00	$0.00	$0.00	$0.00	$484.21	$0.00	$484.21
		Physical Education (26300)	$105.69	$0.00	$0.00	$0.00	$0.00	$105.69	$0.00	$105.69
		Science Mat (29300)	$4,873.53	$0.00	$0.00	-$2,616.45	$0.00	$2,257.08	$0.00	$2,257.08

The report is really meant to be viewed on screen. If you try to print it, be prepared to get out some tape. My suggestion, if you want a printed copy, is to export it to Excel and manipulate it so that you can print it to one page wide.

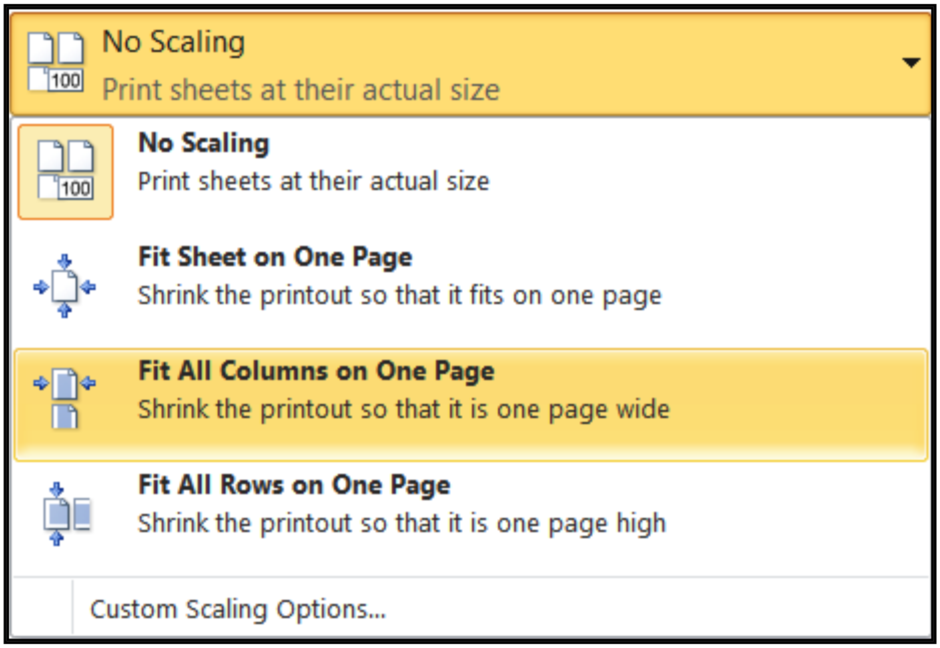
Export to Excel



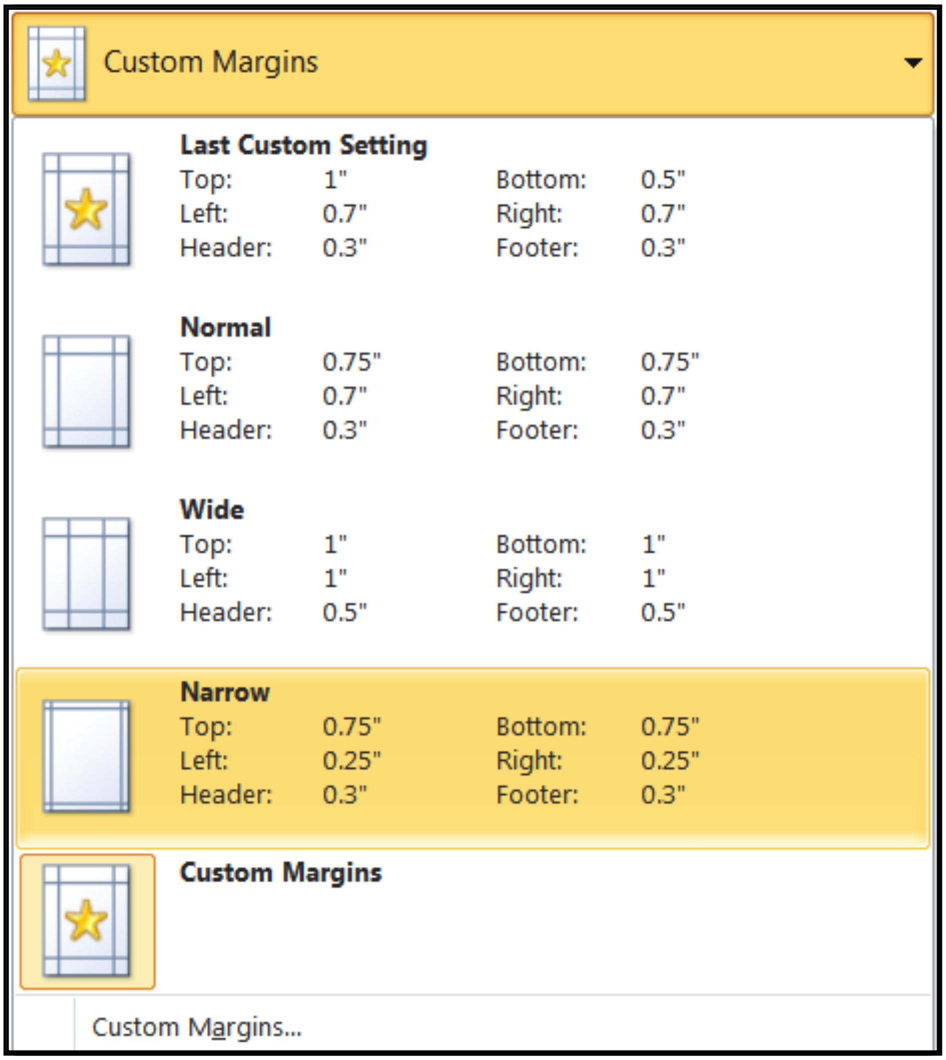
Click on the down arrow, and choose *Excel*.

You will probably get a dialoge box open to ask if you want to open or save the file. Choose either.

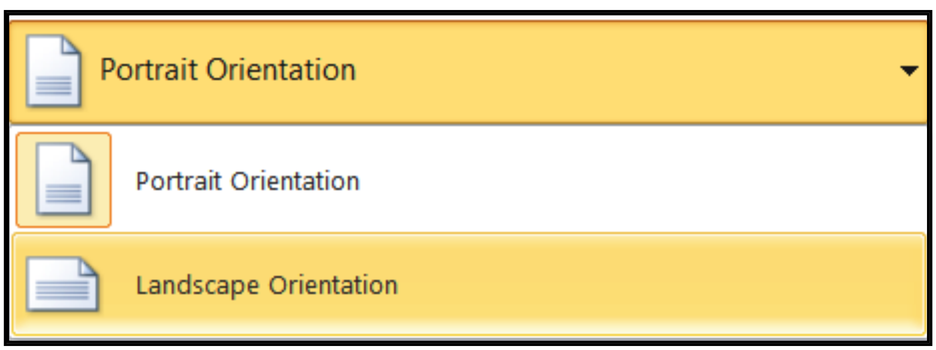
Format the Excel document



When you go to print the report, change the scaling option from ***No Scaling*** to ***Fit All Columns on One Page.***



Change the margins to ***Narrow***.



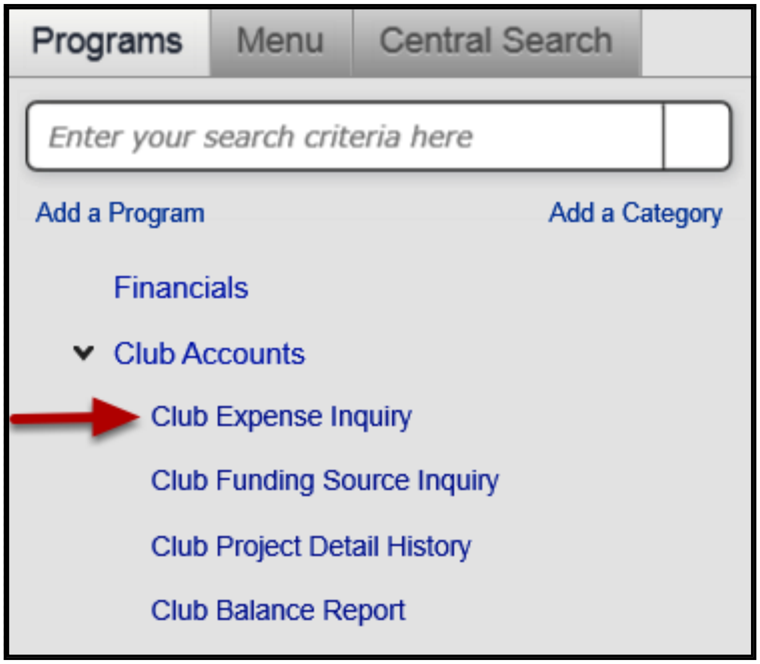
Change the orientation from ***Portrait Orientation*** to ***Landscape Orientation.***

Now you are ready to print the report. If you want to see detail of what has been paid or received in any of these accounts, see the chapters on inquiry, or go on to the next chapter to print a detail report.

Club Expense Inquiry

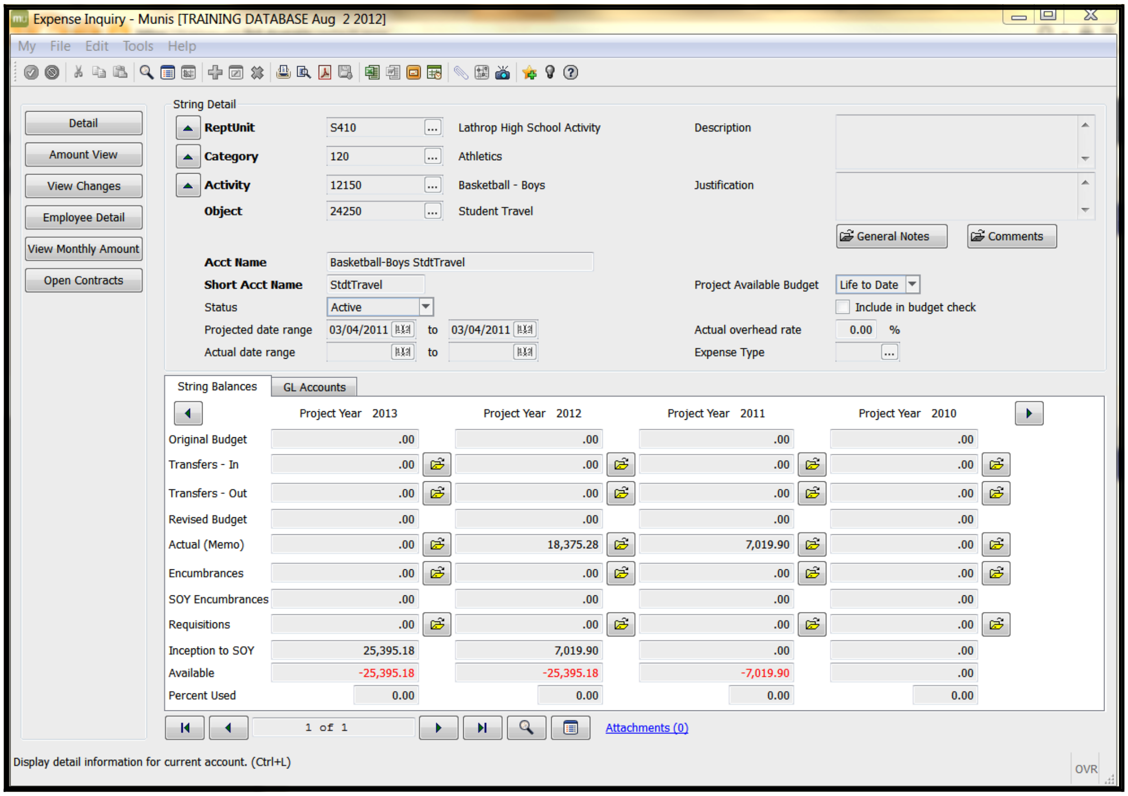
Use the online inquiry in Munis to see what has been charged to a particular club.

Open Expense Inquiry



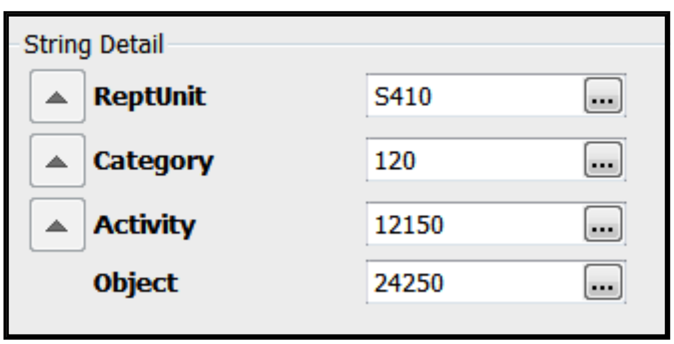
Click on "Club Expense Inquiry" on the "My Programs"

Explore the Expense Inquiry screen



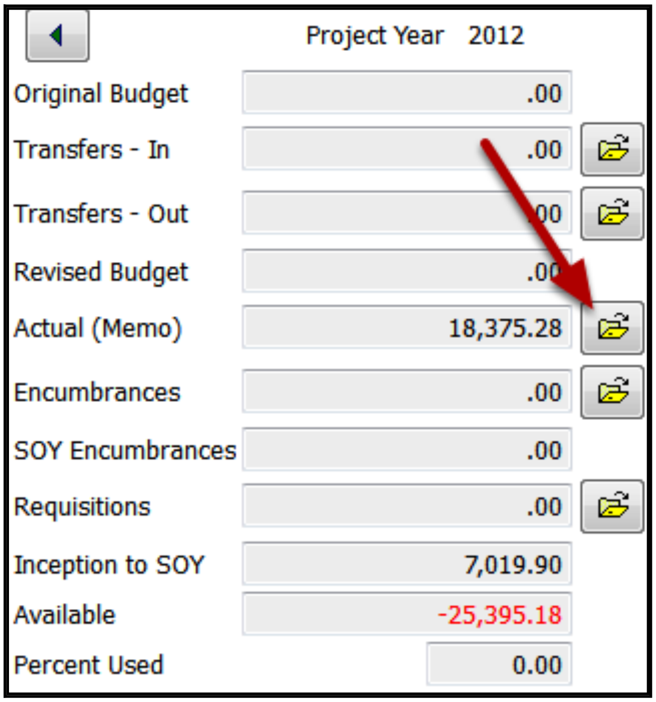
Find the Account

Click on the magnifying glass to find.

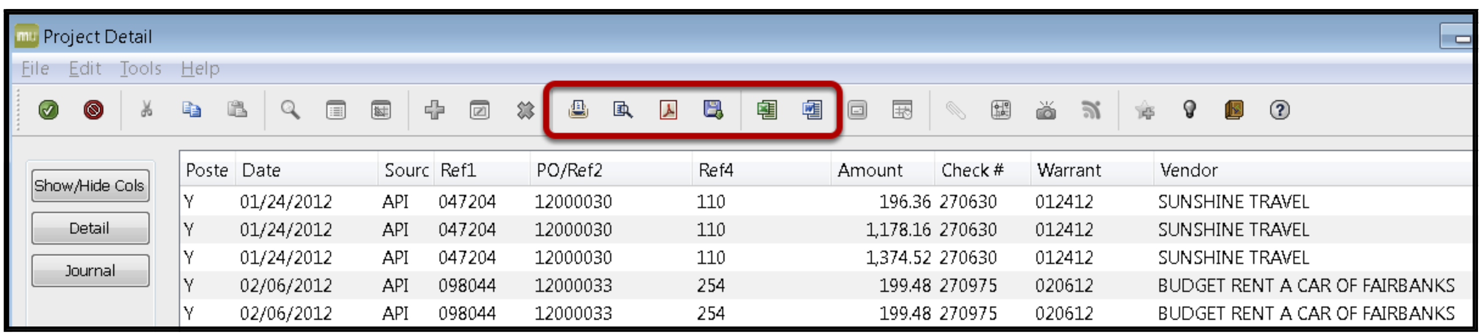


Define the account string to look up. You can fill in any combination of the segments.

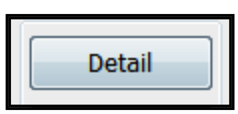
Look at the detail



Notice that there are no budgets. Club accounts don't have budgets. The *Actual (Memo)* line is what has been spent so far in the current year. If there were open purchase orders, there would be an amount in the *Encumbrance* line. You can see open requisitions on the *Requisition* line. To view the detail, click on the file folder icon.



You can see the detail of what was spent from here.
You can also print from this screen, or export to Excel. Use the "Print", "Display", "PDF", "Save", "Excel", or "Word" buttons to output a report from the detail screen.

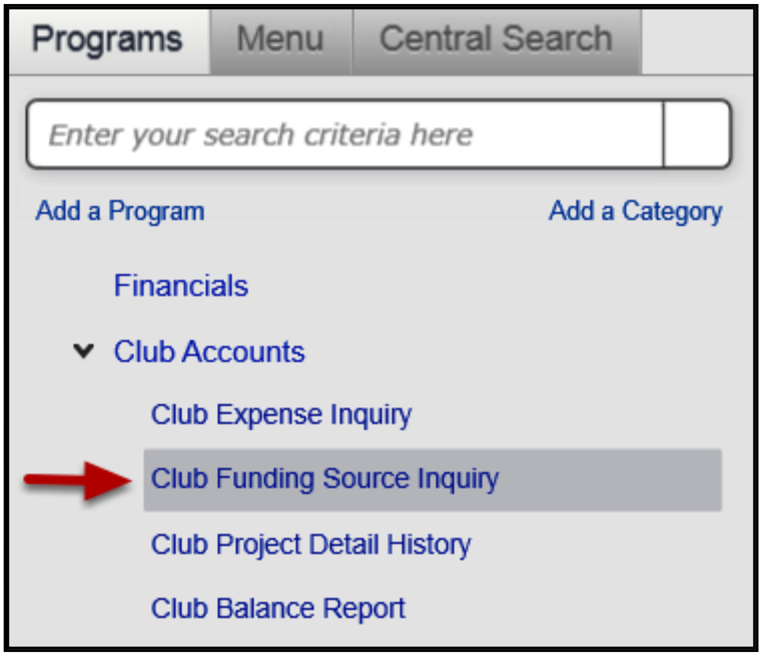


Highlighting a line in the detail listing, and then clicking on the *Detail* button will take you to the backup (invoice, purchase order) inquiry program.

Club Funding Source Inquiry

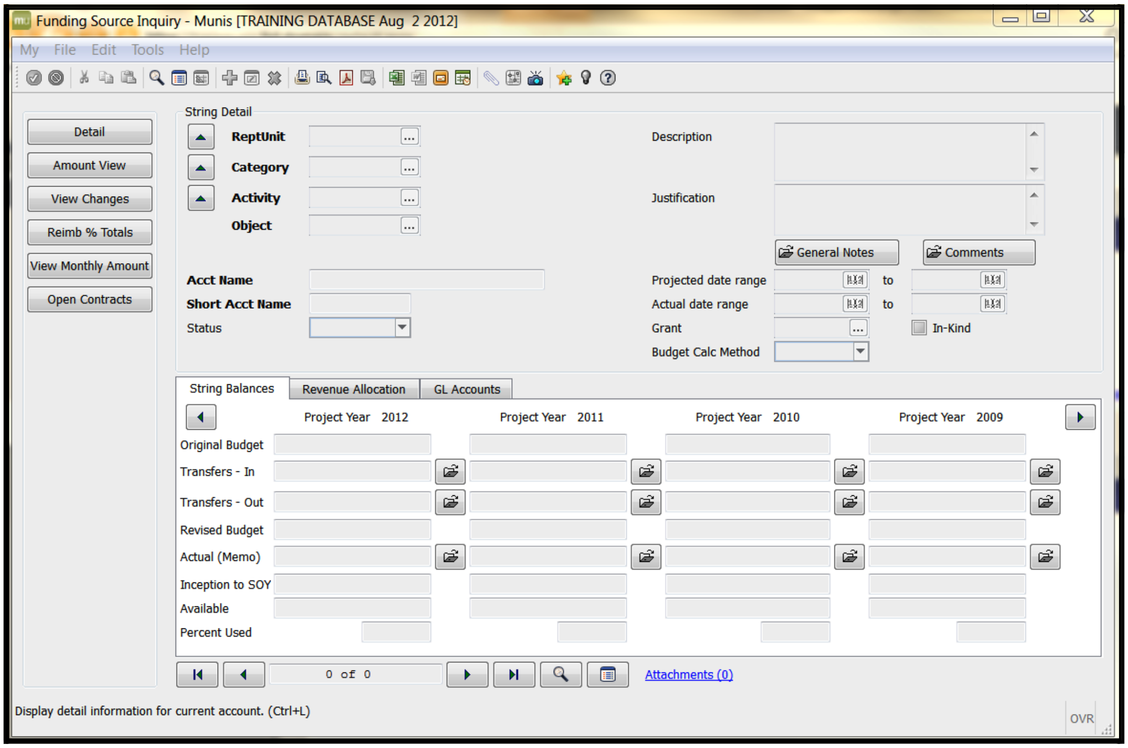
Use the online inquiry in Munis to see what deposits have been credited to a club account.

Open Funding Source Inquiry

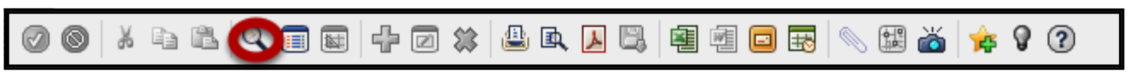


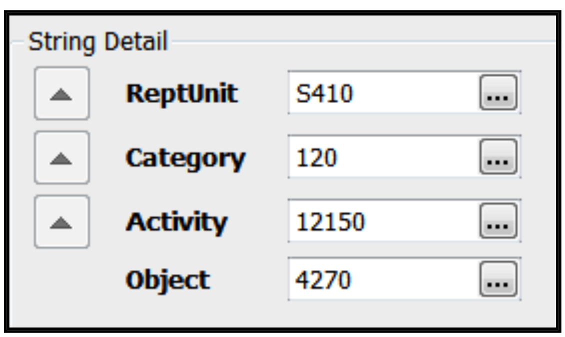
Click on *Funding Source Inquriy* on the *My Programs* sidebar.

Explore the Funding Source Inquiry screen



Find the Account





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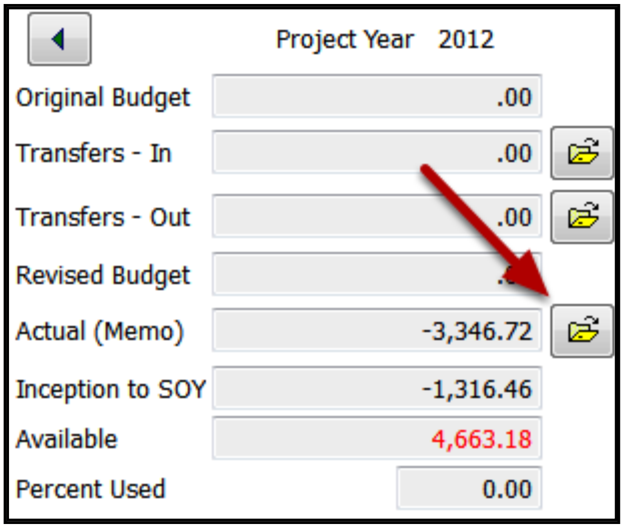
Look at the detail



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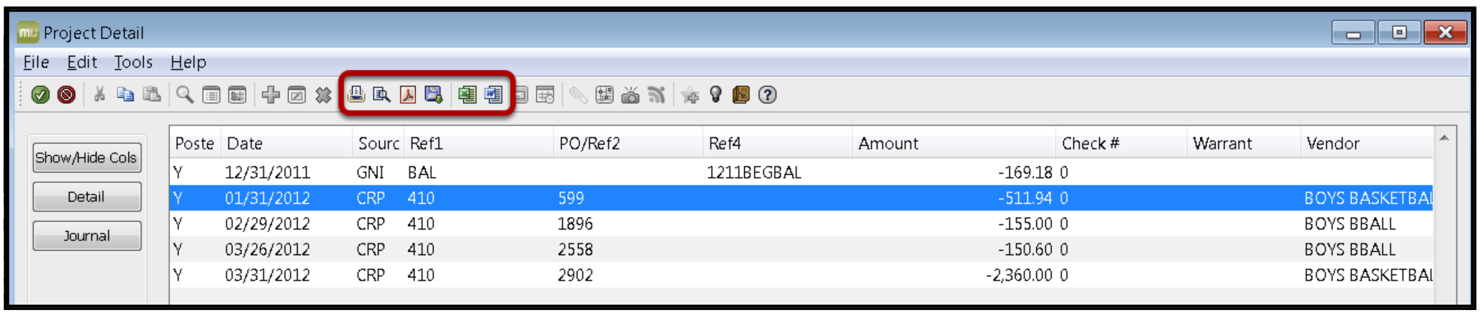
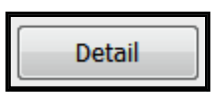


You can see the detail of what was deposited here.
You can output this information by using the "Print", "Display", "PDF", "Save", "Excel", or "Word" buttons.



Highlighting a line in the detail listing, and then clicking on the Detail button will take you to the receipt inquiry program.

Employee Self Service

ESS Overview

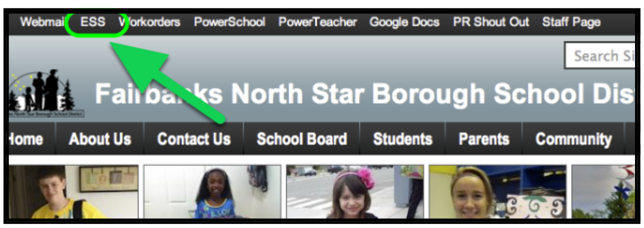
Introduction

Employee Self Service (ESS) allows employees to access and **update their own personal information** though Internet access.
ESS will allow employees to **view:**

- **Payroll Information**
- **Paycheck History**
- **W-4 Elections**
- **W-2**
- **Dependents**
- **Health Benefit Elections**
- **Benefit Costs**
- **Leave Balances**
- **Training Records & Opportunities**

This will review many of the options that are available through ESS to give you a better understanding of its functionality.

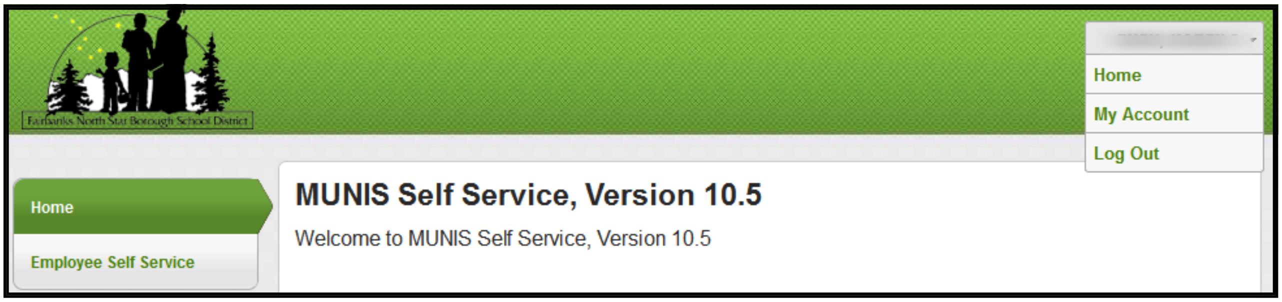
Logging In



Once you log into the district website, select ESS. Alternatively, navigate directly to **selfserve.k12northstar.org** (If you leave the District, the direct URL will be the only way to access ESS)

Initially you will sign in with your "f" number and the last four of your social security number. Munis will require that you change your password upon the first login. You are also required to change your password every six months.

Start Page



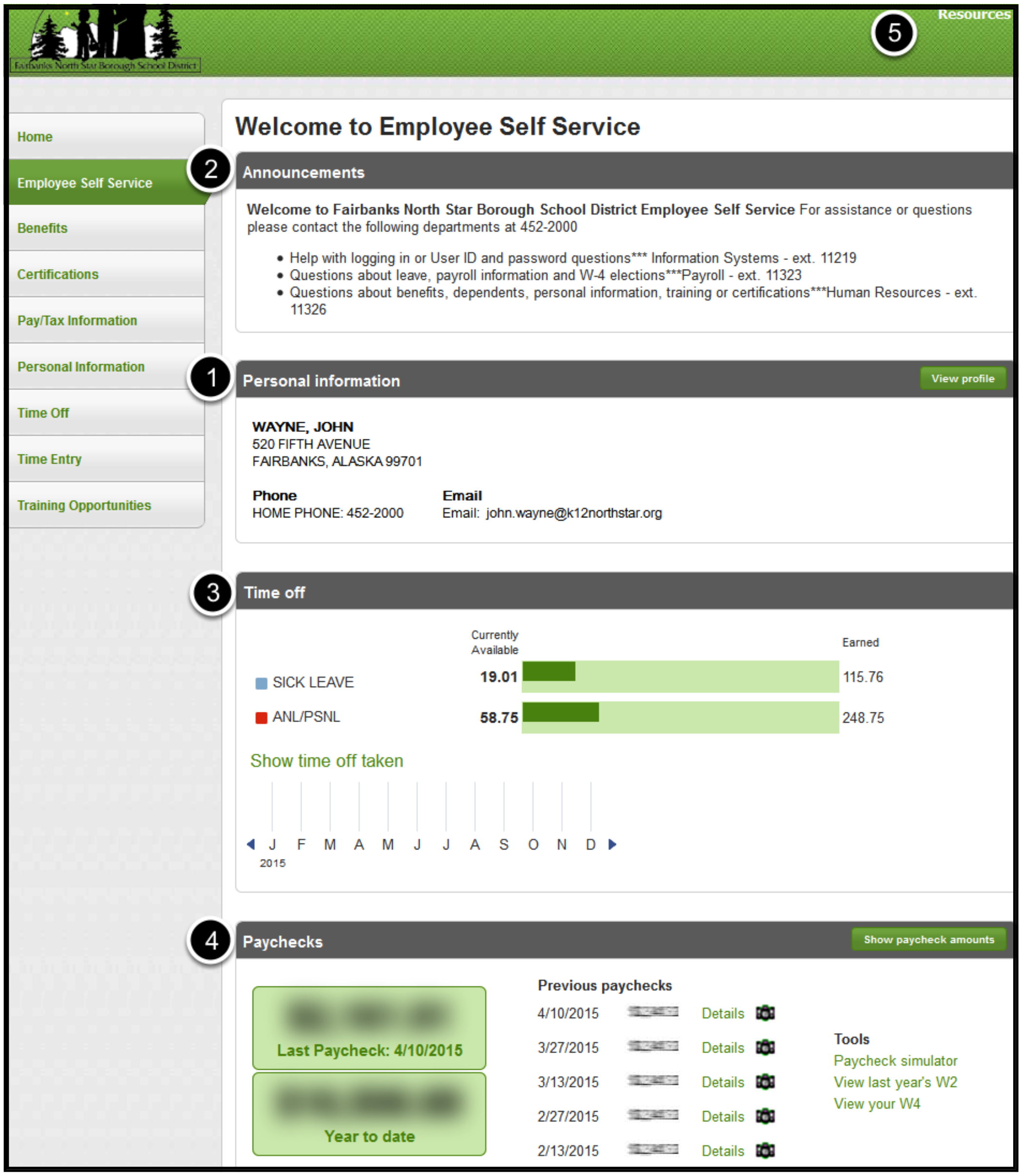
There are three links at the top right of the screen:

- **Home**
- **My Account** (gives you login and password information)
- **Log Out** (use this each time you are done with your session)

Left side bar:

- **Employee Self Service** (Access for all the menus)

Welcome Screen



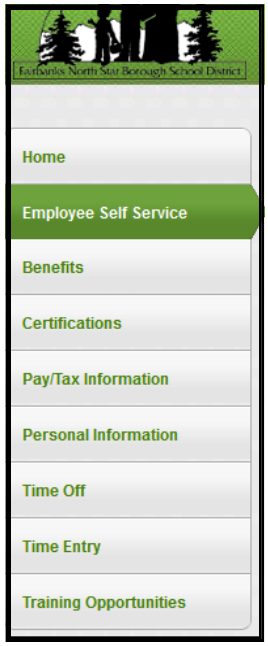
When you first log into ESS, you will see a summary page with various details. This is designed to be a quick, **"at-a-glance,"** summary of pertinent information.

1. **Personal Information** - This section displays the current Name, Address, Phone, and Email information for you.
2. **Announcements** - This section contains a general announcement that all employees will see when they log in. This announcement will be updated by the ESS Administrator.
3. **Time Off -** This section shows a graphical summary of leave types. The earned and used totals are reflected for each leave, as well as the month the time was taken.
4. **Paychecks** - This section displays your paycheck history. The dollar amounts are blurred for privacy, with a link to display the actual figures. The most recent paychecks will display at the

top.
5. **Resources - T**his section displays important documentation and links.

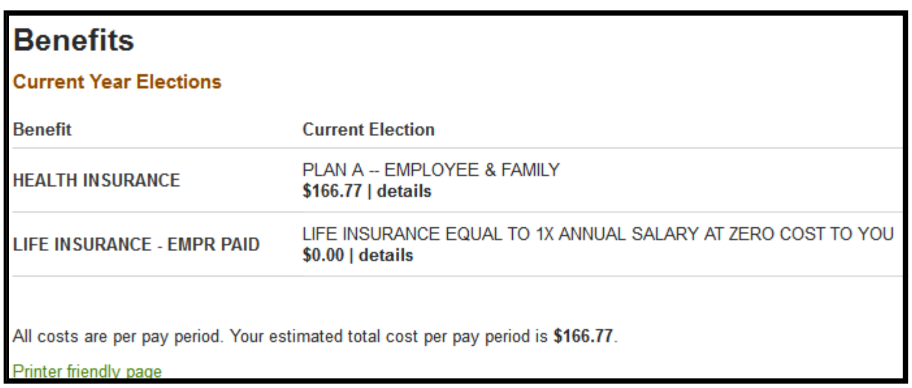
Supervisors (e.g. building principals) are able to view leave for their staff in the section **"Time Off."**

ESS Side Menu



There are numerous options available from the left side menu.

Benefits



Benefits

Current Year Elections

Benefit	Current Election
HEALTH INSURANCE	PLAN A -- EMPLOYEE & FAMILY **$166.77 | details**
LIFE INSURANCE - EMPR PAID	LIFE INSURANCE EQUAL TO 1X ANNUAL SALARY AT ZERO COST TO YOU **$0.00 | details**

All costs are per pay period. Your estimated total cost per pay period is **$166.77**.

Printer friendly page

This section displays your current benefit elections. During the November Open Enrollment, you will be given the opportunity to change your elections with links to the pertinent documents to download and submit to Human Resources, as needed.

Certifications

Certifications

Type	Area	Level	Number	Effective	Expires
REQUIRED	PHYSICAL			11/10/1999	12/31/9999
REQUIRED	BLOODBORNE PATHOGEN ANNUAL	NONE		2/3/2015	2/3/2015
REQUIRED	CHILD ABUSE PREVENTION			9/29/2014	9/29/2019
REQUIRED	FINGERPRINT			1/20/2000	

Any current certifications you hold will be viewable here. This gives you the ability to confirm the details for accuracy.

Pay/Tax Information

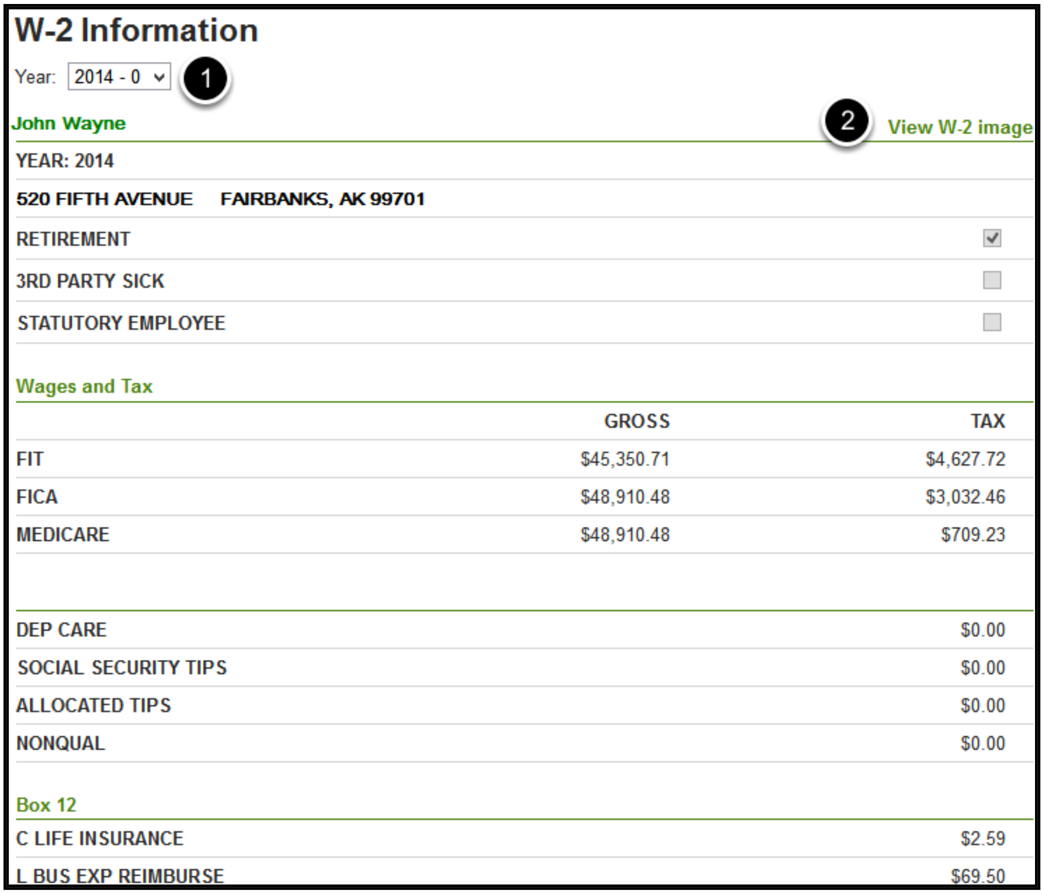
Pay/Tax Information

Wayne, John Year 2015

Check Date	Pay Period	Status	Gross Pay	Net Pay	
4/10/2015	3/23/2015 - 4/5/2015	Cleared	$2,161.91	$1,438.97	Details
3/27/2015	3/9/2015 - 3/22/2015	Cleared	$2,079.10	$1,379.34	Details
3/13/2015	2/23/2015 - 3/8/2015	Cleared	$1,870.88	$1,230.57	Details
2/27/2015	2/9/2015 - 2/22/2015	Cleared	$2,079.10	$1,379.34	Details
2/13/2015	1/26/2015 - 2/8/2015	Cleared	$2,078.75	$1,379.43	Details
1/30/2015	1/12/2015 - 1/25/2015	Cleared	$2,079.10	$1,379.34	Details
1/16/2015	12/29/2014 - 1/11/2015	Cleared	$2,078.75	$1,379.43	Details
1/2/2015	12/15/2014 - 12/28/2014	Cleared	$2,079.10	$1,379.34	Details

This screen allows you to view all your paychecks and drill down into each check detail. This detail is available since the transition to Munis on January 1, 2012.

W-2



W-2 Information

Year: 2014 - 0

1

John Wayne

2

View W-2 image

YEAR: 2014

520 FIFTH AVENUE FAIRBANKS, AK 99701

RETIREMENT	☑
3RD PARTY SICK	☐
STATUTORY EMPLOYEE	☐

Wages and Tax

	GROSS	TAX
FIT	$45,350.71	$4,627.72
FICA	$48,910.48	$3,032.46
MEDICARE	$48,910.48	$709.23

DEP CARE	$0.00
SOCIAL SECURITY TIPS	$0.00
ALLOCATED TIPS	$0.00
NONQUAL	$0.00

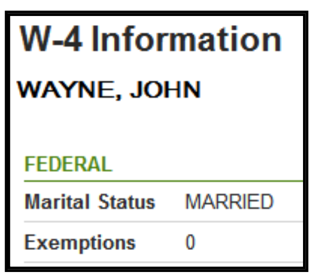
Box 12

C LIFE INSURANCE	$2.59
L BUS EXP REIMBURSE	$69.50

This screen allow you to view your W-2 elections.

1. The current year is displayed by default; previous years can be viewed with the drop down.
2. Click here to view an image of your actual W-2.

W-4



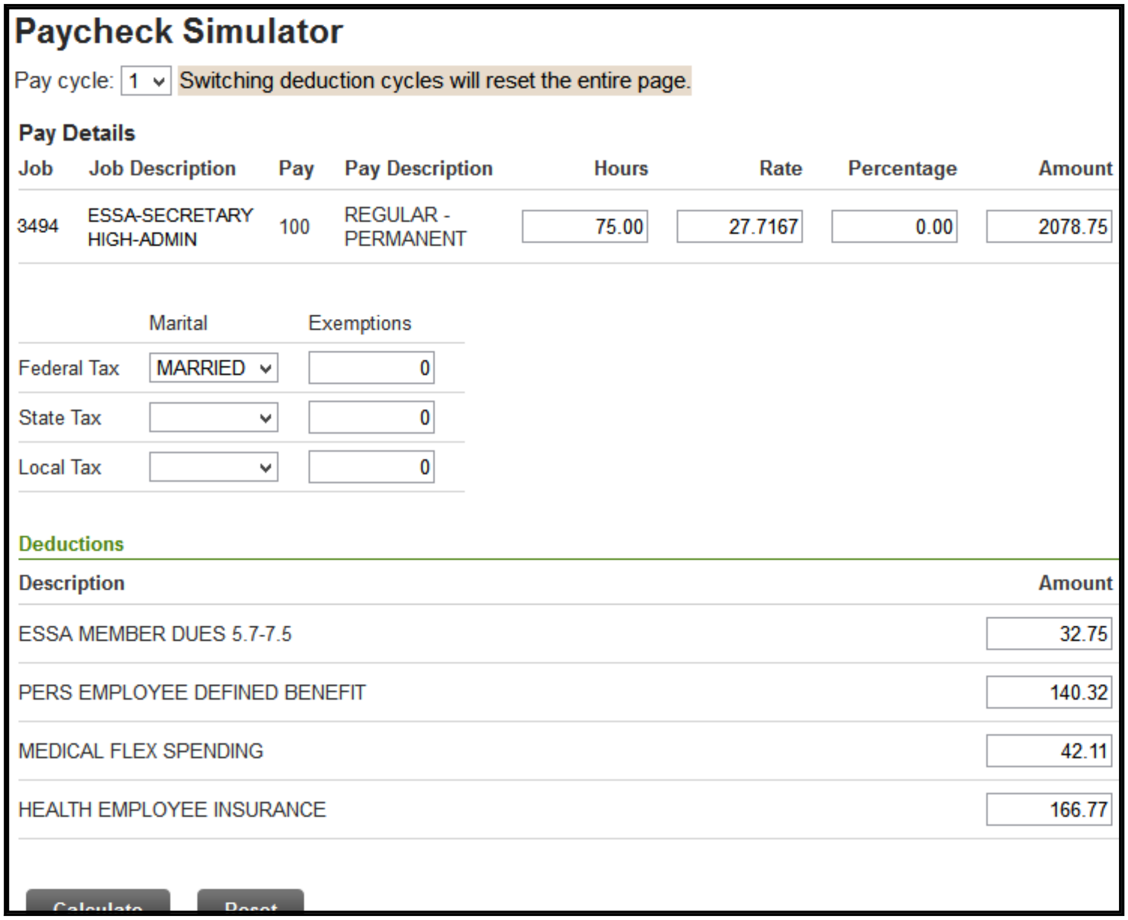
W-4 Information

WAYNE, JOHN

FEDERAL

Marital Status	MARRIED
Exemptions	0

This screen allows you to view your current federal withholding elections.



Paycheck Simulator

Pay cycle: 1 Switching deduction cycles will reset the entire page.

Pay Details

Job	Job Description	Pay	Pay Description	Hours	Rate	Percentage	Amount
3494	ESSA-SECRETARY HIGH-ADMIN	100	REGULAR - PERMANENT	75.00	27.7167	0.00	2078.75

	Marital	Exemptions
Federal Tax	MARRIED	0
State Tax		0
Local Tax		0

Deductions

Description	Amount
ESSA MEMBER DUES 5.7-7.5	32.75
PERS EMPLOYEE DEFINED BENEFIT	140.32
MEDICAL FLEX SPENDING	42.11
HEALTH EMPLOYEE INSURANCE	166.77

This screen allows you to view your current deductions and to make modifications and recalculate a **"what if"** example of your paycheck. This only serves as a simulator, and does not change any of your elections or deductions.

Personal Information

Personal Information

Employee Preferred Name change

Preferred Name	N/A

Address / E-mail change

Home Address	520 FIFTH AVENUE FAIRBANKS, AK 99701
E-mail	john.wayne@k12northstar.org
Alternate E-mail	

Options change

W-2 Delivery Method	Mail and email

Telephone Add Telephone Number

Type	Description	Number	Unlisted	
PRIMARY	HOME PHONE	907-452-2000	No	Change
EXTENSION		907-452-2000	No	Change | Delete
CELL	CELL	907-452-2000	No	Change | Delete

Dependents

Name	Relationship	Date Of Birth	Gender	Student	
JOHN WAYNE	EMPLOYEE	10/11/1940	MALE	No	Details
JANICE WAYNE	CHILD	11/27/1995	FEMALE	No	Details
MARY WAYNE	SPOUSE	12/10/1941	FEMALE	No	Details

Emergency Contacts Add Emergency Contact

Name	Relationship	Phone	Comments	
STEVE WAYNE		907-456-1111		Change | Delete
MARY WAYNE	SPOUSE	907-456-5656		Change | Delete

This screen allows you to view and make changes to the personal information on file in Munis. The items in green are selectable to edit your information. You can also see your dependents and gives you the ability to confirm details for accuracy.

Employee Profile

This screen gives you an overview of all your personal information for accuracy. If any discrepencies are discovered, please contact the Human Resources Department

Time Off

Time Off

	Earned	Taken	Currently Available
SICK LEAVE (H)	115.76	96.75	19.01
ANL/PSNL (H)	248.75	190.00	58.75

This screen gives you leave totals for **earned, taken and available.**

Supervisors have the ability to view your staff accruals in the employee drop down.

Training Opportunities

Training Opportunities

Courses Calendar | My Training

All Training | By Location | Search

Description	Date	Time	
PRECAUTIONS AGAINST BLOOD-BORNE PATHOGENS	1/5/2012 to 12/31/9999	12:00 AM	Details*
INTRODUCTION TO THINKING MAPS	3/26/2015 to 5/7/2015	4:15 PM	Details / Enroll
TEACHER EVALUATION WORKGROUP	4/11/2015 to 9/30/2015	8:30 AM	Details / Enroll
CPI REFRESHER	4/15/2015	8:30 AM	Details / Enroll

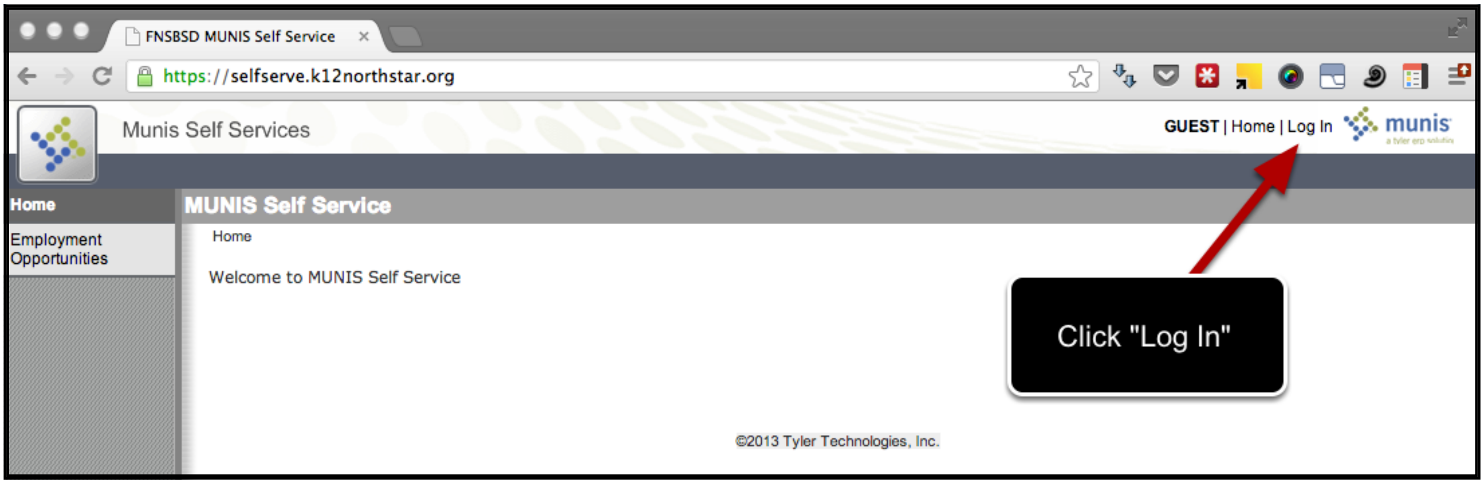
* You have already enrolled in this training

This screen lists available training opportunities.

ESS - Reset Password

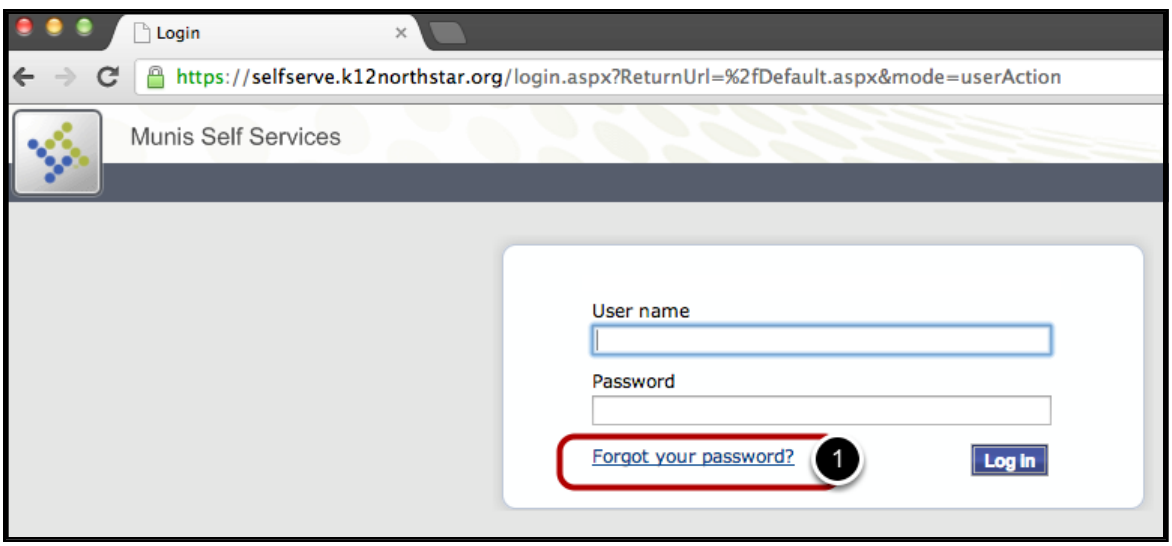
This lesson gives a step by step demonstration of the password reset process in Munis ESS.

Logging In



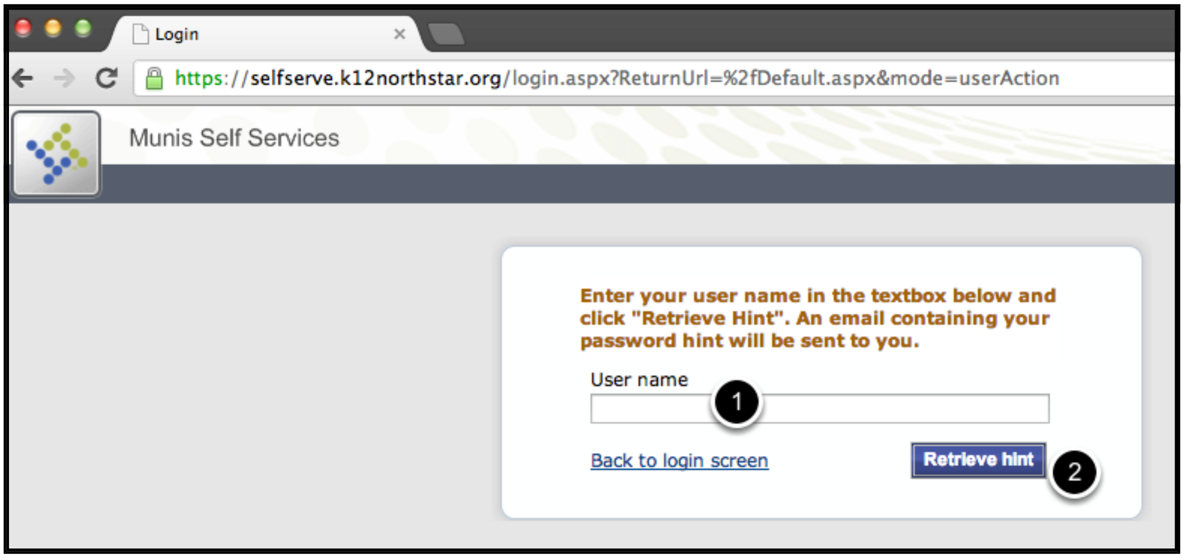
After navigating to Munis ESS @ https://selfserve.k12northstar.org
Click the "Log In" text in the upper right hand corner of the browser.

Log in problems



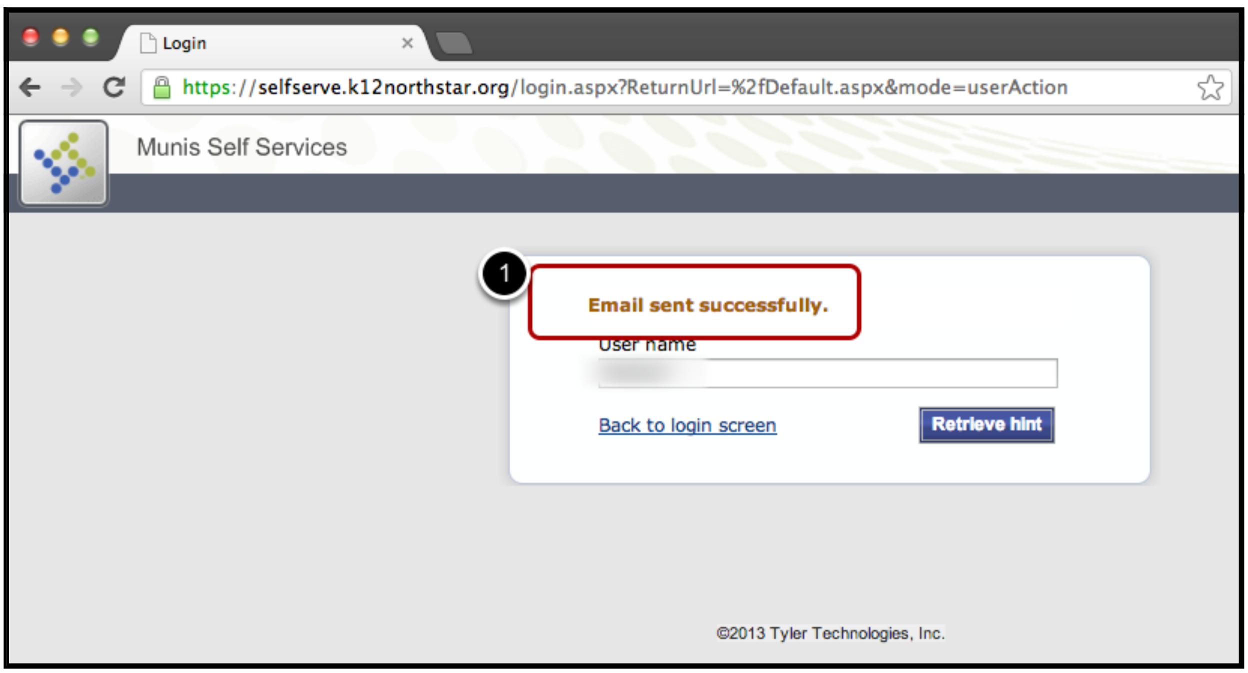
1. If you can't log in to ESS, first try resetting your password using the "Forgot your password?" link.

Hint Retrieval



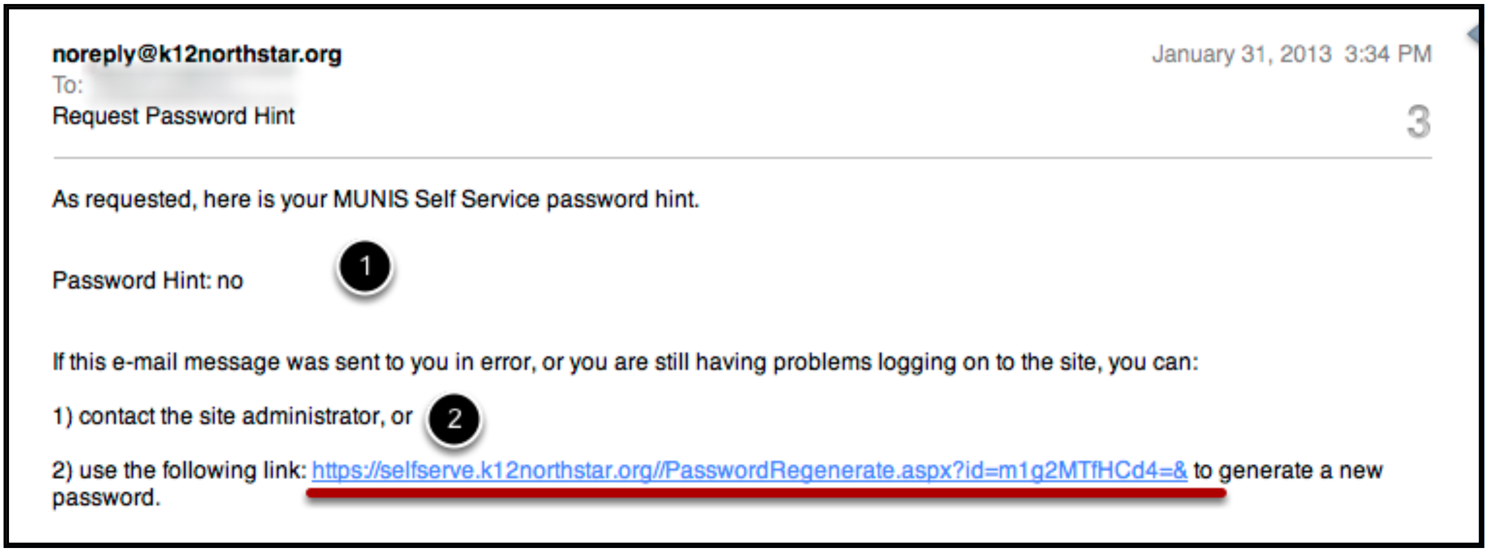
1. Your username is your "F" number. For example f12345
2. Click "Retrieve hint"

Hint retrieval success



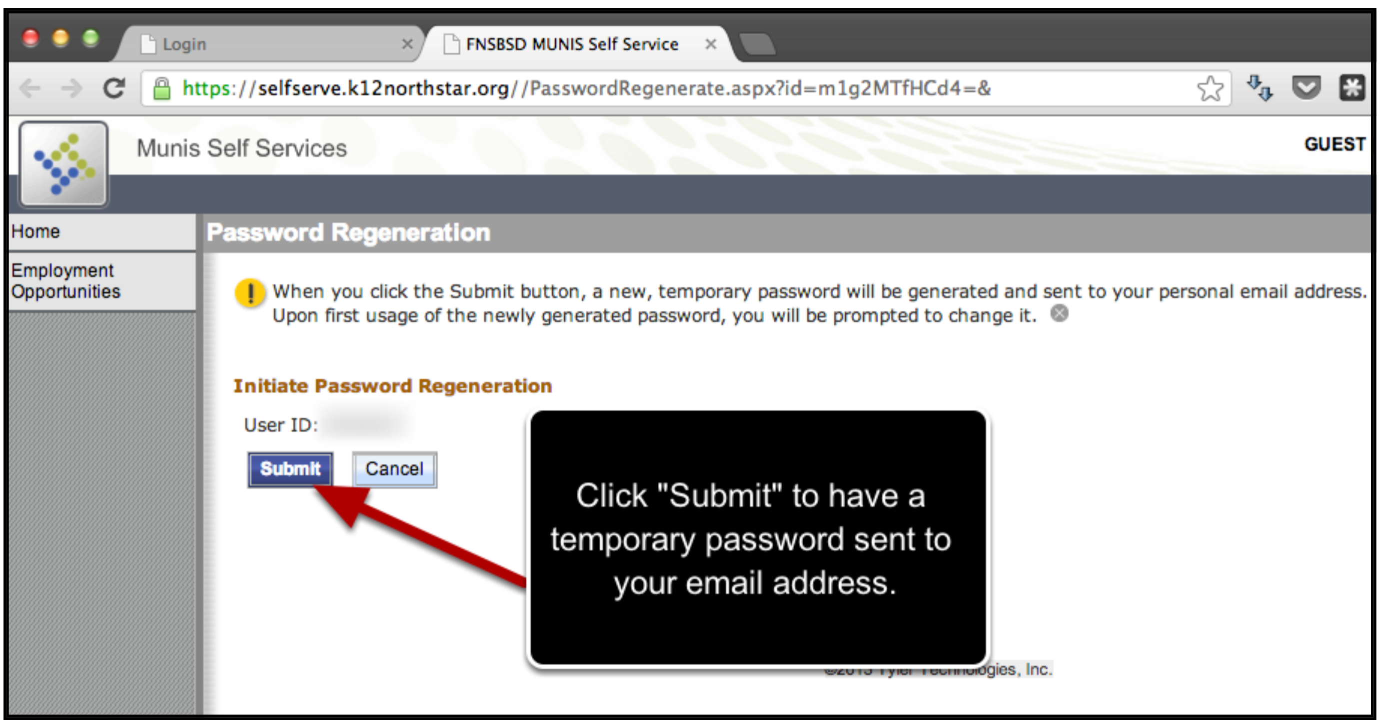
1. The system will send password reset information to your email address.

Hint retrieval email notification



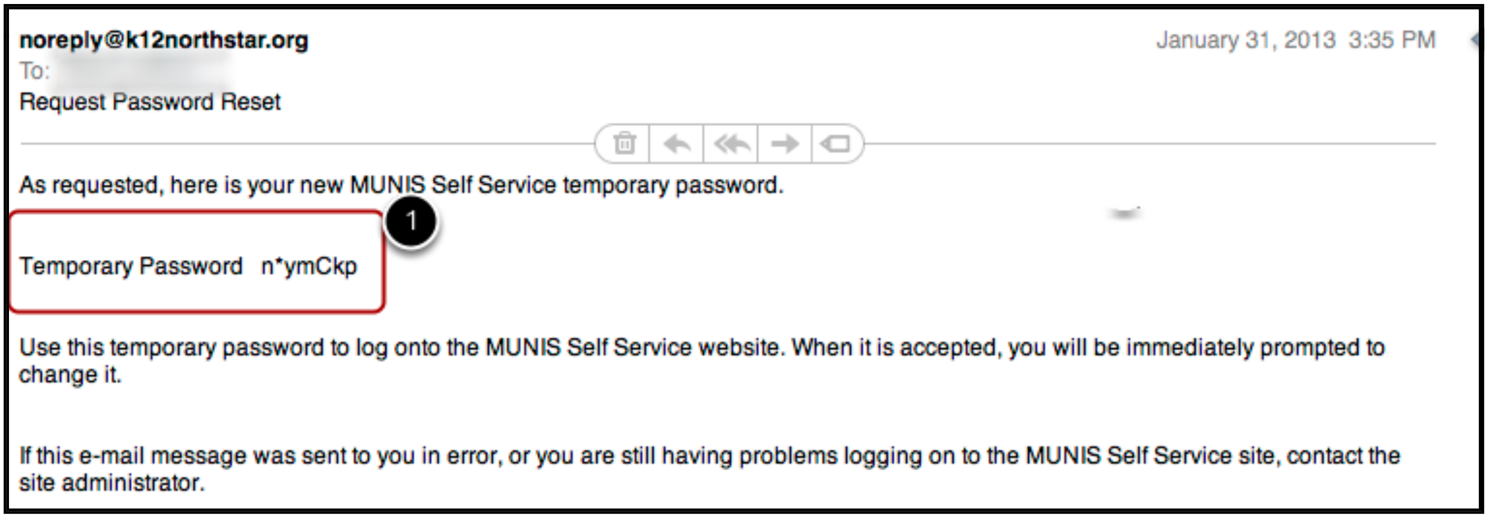
1. If you set a "Hint" when you updated your password the last time, it will be displayed here.
2. If the 'Hint" doesn't help, click this link to get a new temporary password.

New password generation



Clicking "Submit" will send another email to you with a temporary password.

Temporary password email



1. Now you can log in to ESS with your new temporary password.

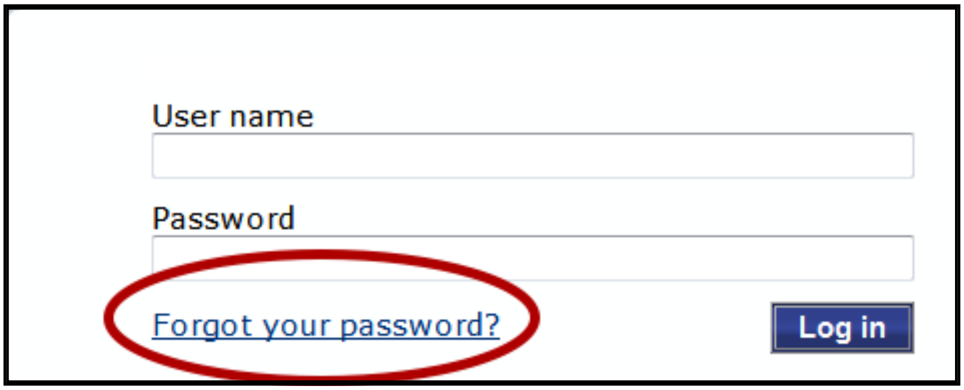
Incorrect Email Address?

Most current employees will have their district email address in ESS. Subs, temps, retirees and some other users will likely have a personal email address in ESS.
If your email address in ESS is invalid or hasn't been entered, HR can enter or modify your email address so that you can take advantage of the password retrieval function.

Trouble Logging into ESS?

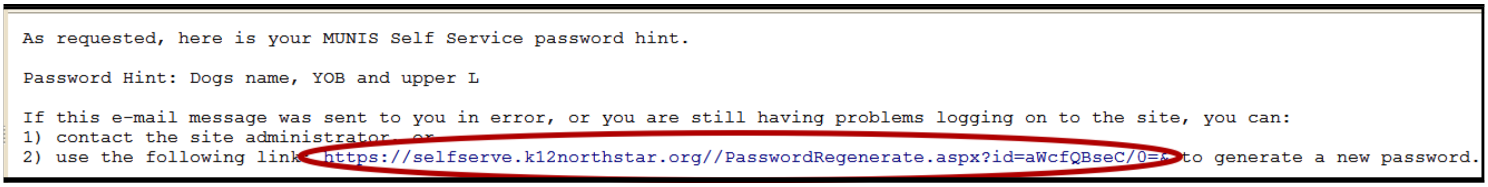
Important notes about ESS

- **Your user name is always your "f" number.**
- **You have to reset your password every six months.**
- **Your ESS password is seperate from your password used to do school district business.**
- **The password requirement must be at least 6 characters long, contain at least 1 numeric character and contain at least one uppercase character and one lowercase character**
- **If you get a message that your account has been locked you must have it reset. Do this by calling Natalie 452-2000 ext 11219.**
- **You can access ESS directly by going to https://selfserve.k12northstar.org**

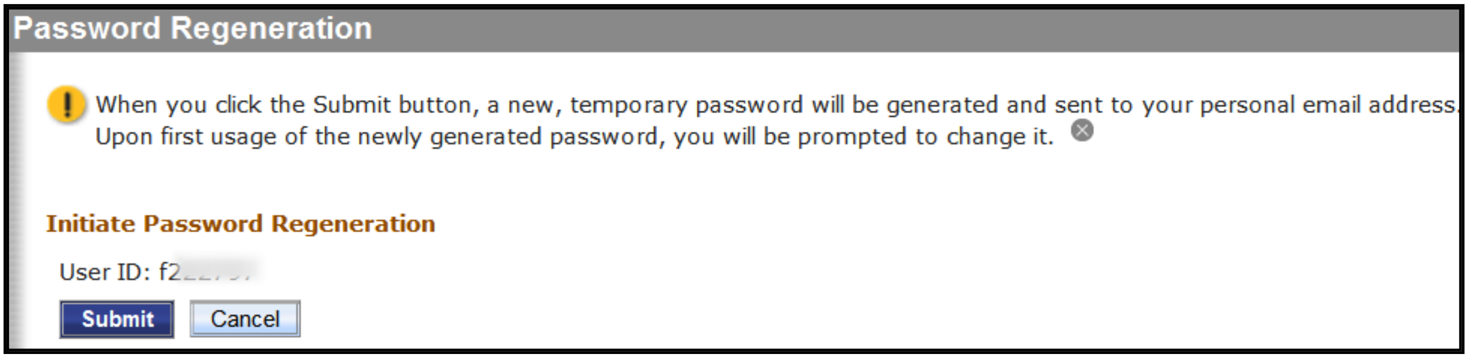


If your are having trouble remembering your password click the "Forgot your password" link.

Type in your "f" number, and click "Retrieve Hint."



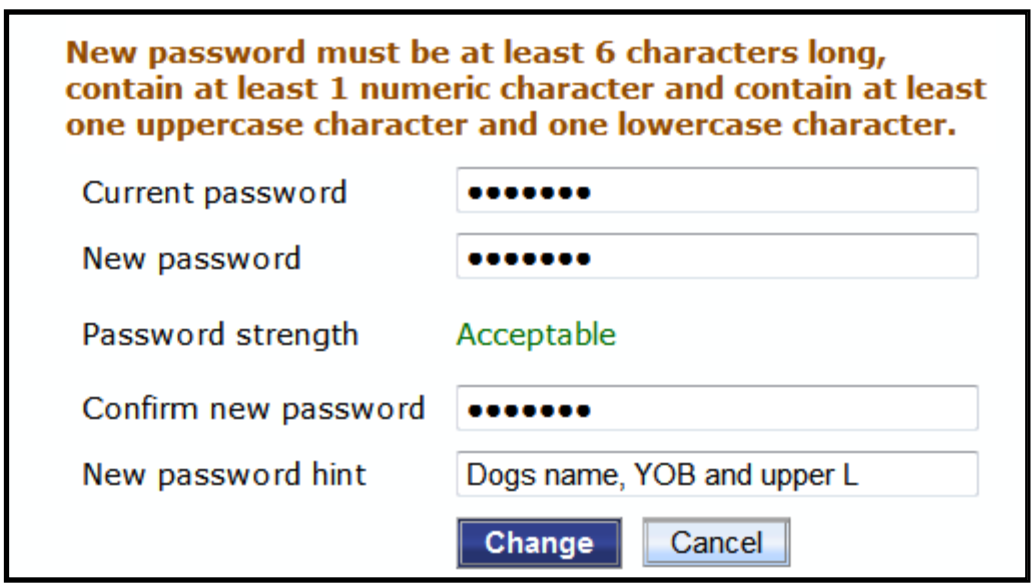
You will receieve an email with the hint your created. If your hint does not help you to log in, you can click the link to generate a temporary password.



You must click "Submit" on this screen to email yourself a temporary password. Follow the directions on the screen once it says an email was sent.

You will receive an email with a temporary password.

Go to the log in page again and use your temporary password.



You will be prompted to change your password. PLEASE put in a good password hint!

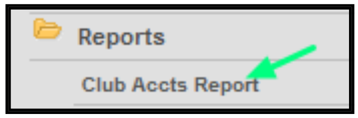
If you get an error message saying that it did not like your current (old) password, try logging in with the new password you just tried creating

Financials

Admin Secretary Club Account Numbers (Project Strings)

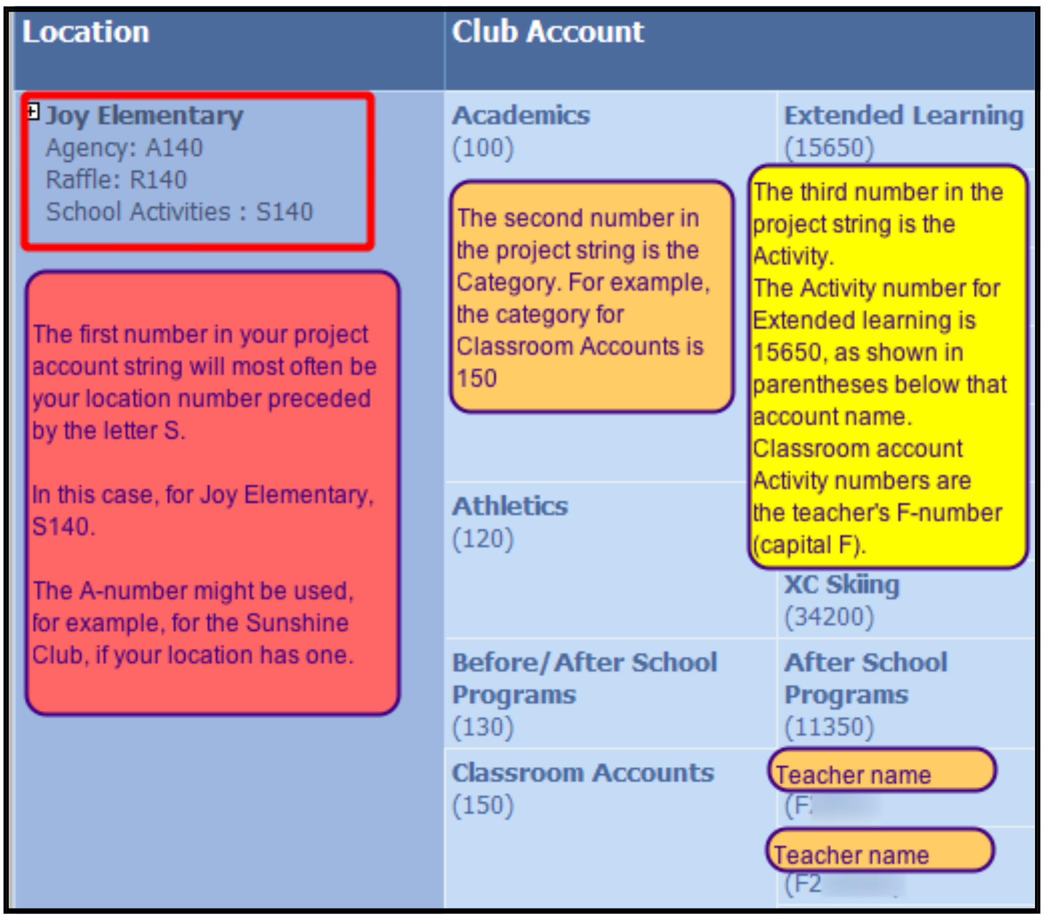
Using the Club Accounts "favorite" to help identify the correct account number for related expenditures.

Open Your Club Accounts Favorite



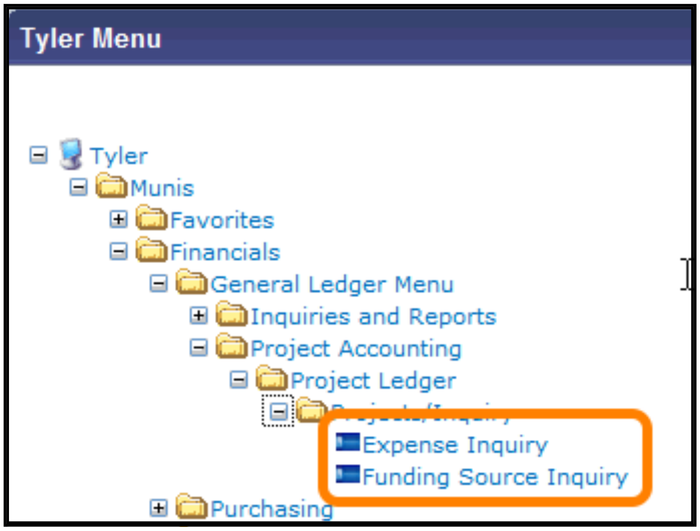
If you haven't already made a "favorite" for the Club Accounts Report, find the tutorial on the **Munis Training Materials** page at the district Website.

Additional Information On the Club Accounts Report



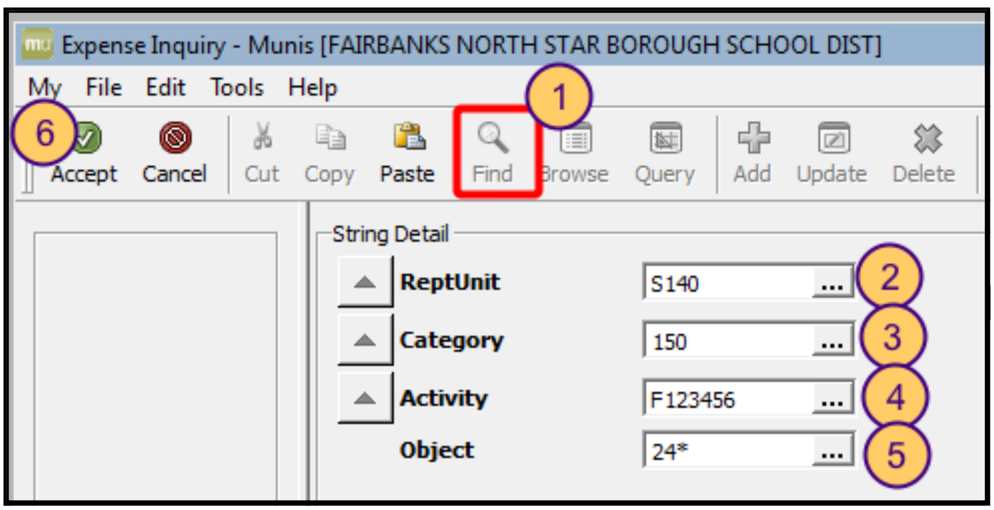
Some account information has been added to the report to assist you in finding the correct project string to use with your club accounts.
You will want to refer to this chart when looking for the entire project string.

Tyler Menu



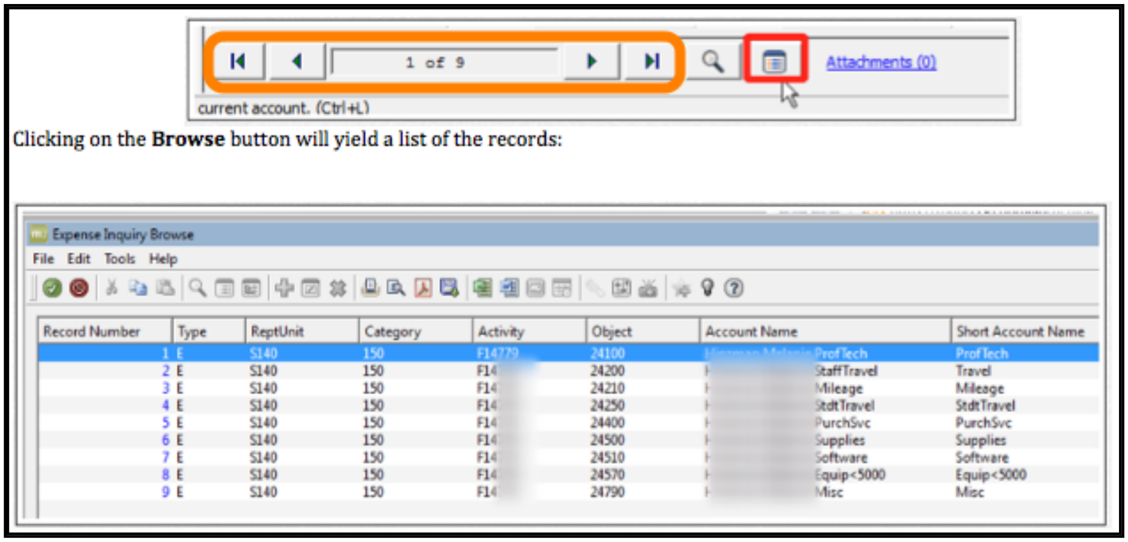
On your Munis home page, locate and open **Expense Inquiry** for expenditures.
To inquire on revenues, click on **Funding Source Inquiry**.
Right-click on either or both of these selections to add them to your list of favorite programs, if desired.

Find the Project String



1. Click the **Find** button.
2, 3, 4. Enter the **ReptUnit**, **Category**, and **Activity** for the account you seek as shown on the **Club Accounts Report** page.
5. To view all of the expenditures for a club, leave the **Object** blank. Put in all or part of the **Object** to narrow the results. "Supplies" are 24500. The asterisk is viewed by the search as a wild card.
6. Click the **Accept** button.

Verify the Project String



Record Number	Type	ReptUnit	Category	Activity	Object	Account Name	Short Account Name
1	E	S140	150	F14779	24100	ProfTech	ProfTech
2	E	S140	150	F14	24200	StaffTravel	Travel
3	E	S140	150	F14	24210	Mileage	Mileage
4	E	S140	150	F14	24250	StdtTravel	StdtTravel
5	E	S140	150	F14	24400	PurchSvc	PurchSvc
6	E	S140	150	F14	24500	Supplies	Supplies
7	E	S140	150	F14	24510	Software	Software
8	E	S140	150	F14	24570	Equip<5000	Equip<5000
9	E	S140	150	F14	24790	Misc	Misc

You can navigate through the different expenditure accounts by using the navigation buttons at the bottom of the page (orange rectangle).
Browse a list of records by clicking on the button outlined in red. From this list, it's easy to see the complete Project String.
Double-click on a line to view the balance information.

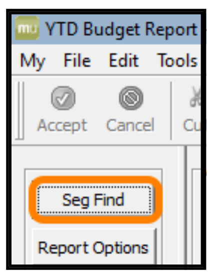
"Bottom Line" YTD Budget Report

The example acount segments in this tutorial will yield results for regular instruction supplies. Your results may vary depending on the account segments you enter in Step 3.

Step 1.

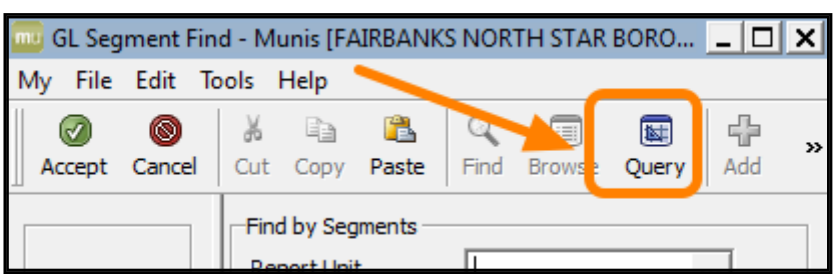
From the **Departmental Functions** menu, click on **YTD Budget Report**.

Step 2.



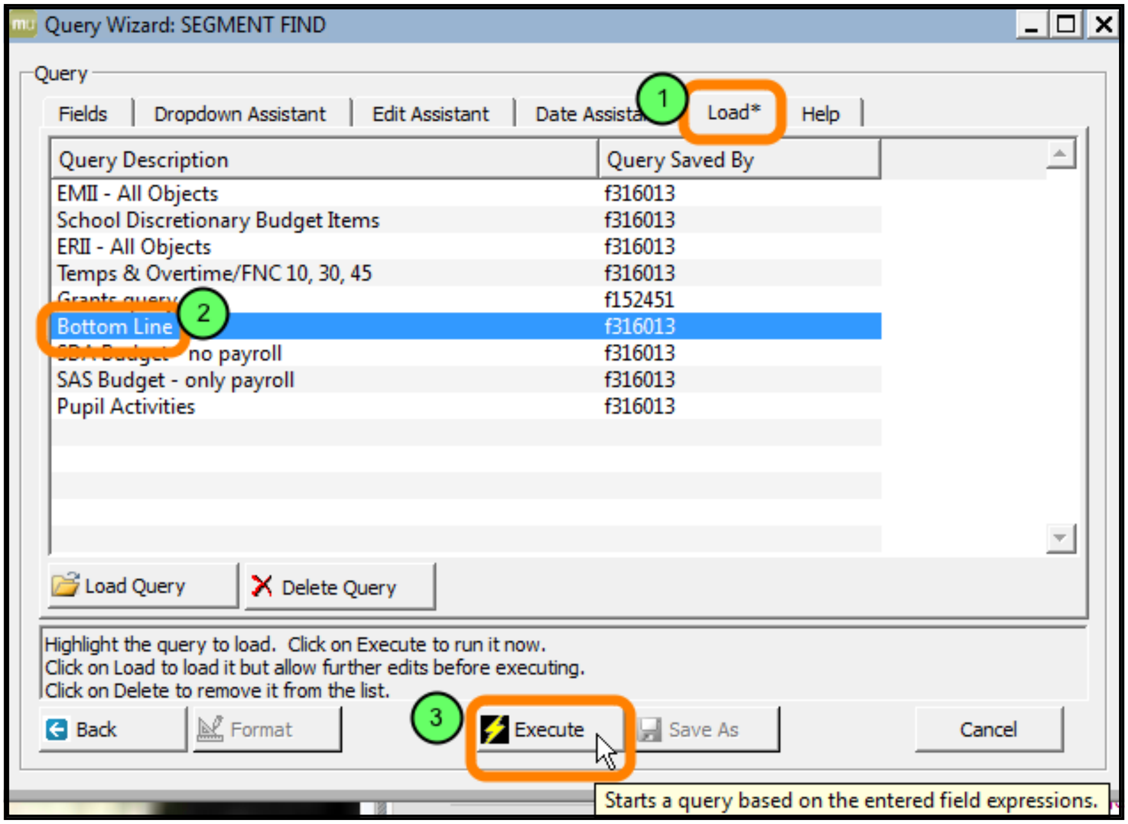
Click on **Seg Find**.

Step 3.



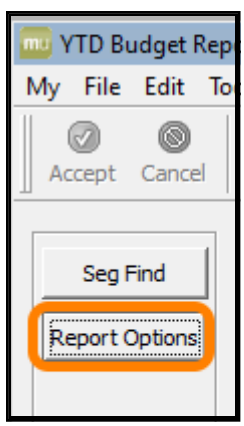
Click on the **Query** button.

Step 4.



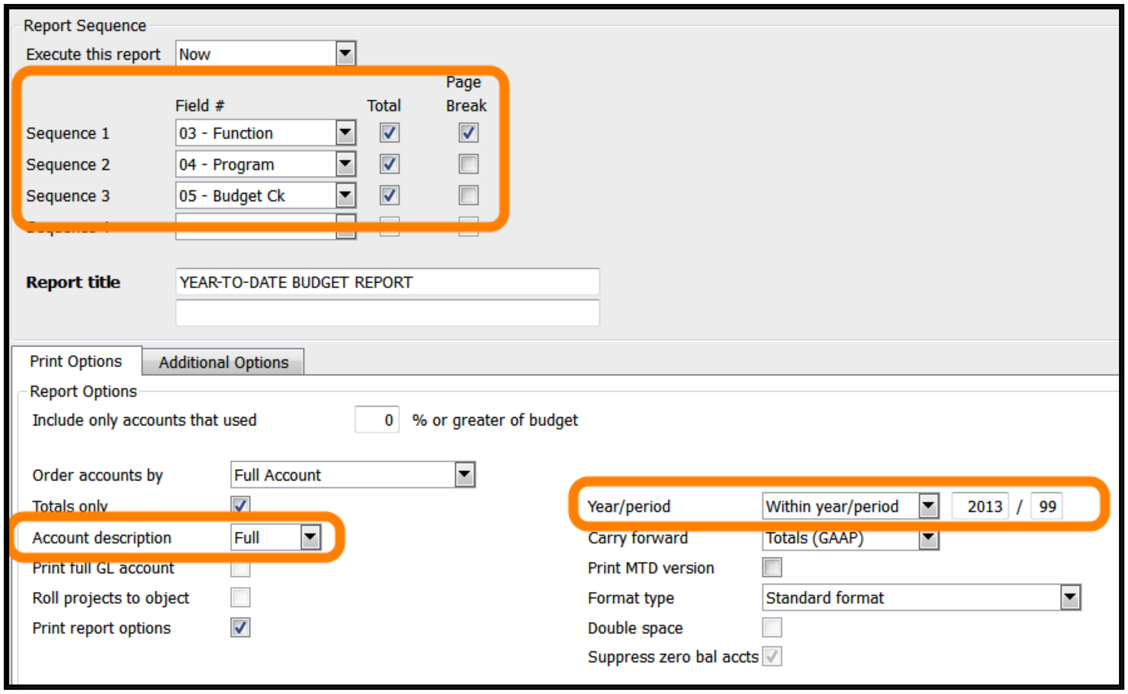
Click on the **Load*** tab to find predefined reports.
Click on **Bottom Line** to highlight that report.
Click the **Execute** button to run the report.

Step 5.



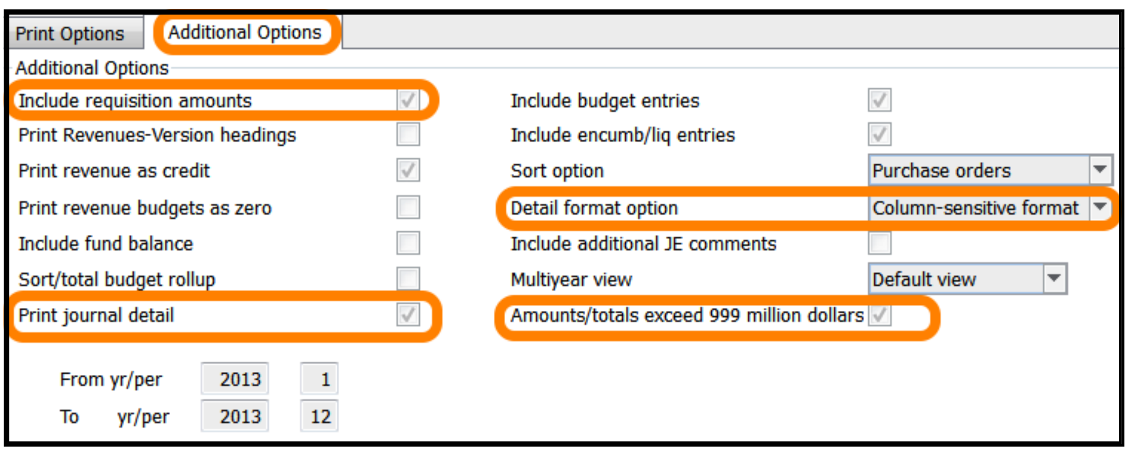
Once you have clicked on the **Execute** button, you will be returned to the YTD Budget Report pane.
Click on Report Options to define the display parameters for the report.

Step 6.



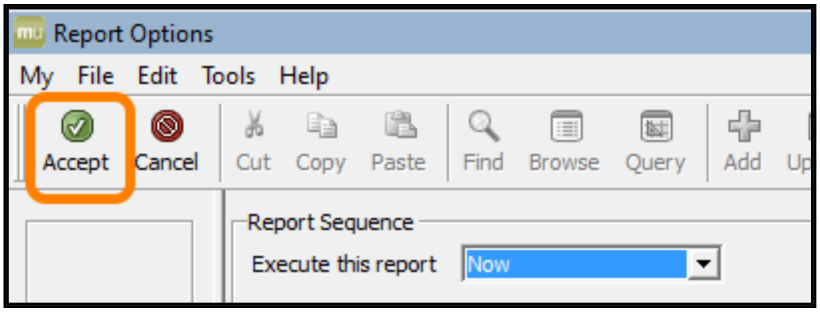
This picture shows the set-up for the **Bottom Line** report.
Year/period = 2012/99 will include the memo balances.

Step 7.



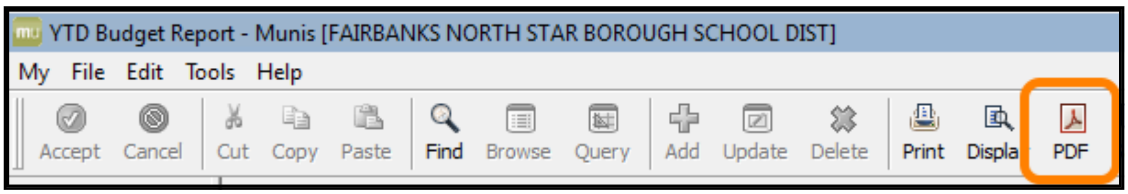
Click on the Additional Options tab.
Configure the **Additional Options** tab including the items in orange as shown above.

Step 8.



Accept your report options configuration, then close that pane (X out).

Step 9.

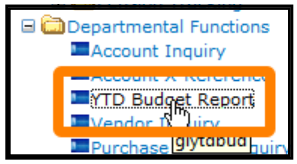


Back on the YTD Budget Report pane, click on the PDF button to render the report according to your report options.

Scheduling a Recurring Report

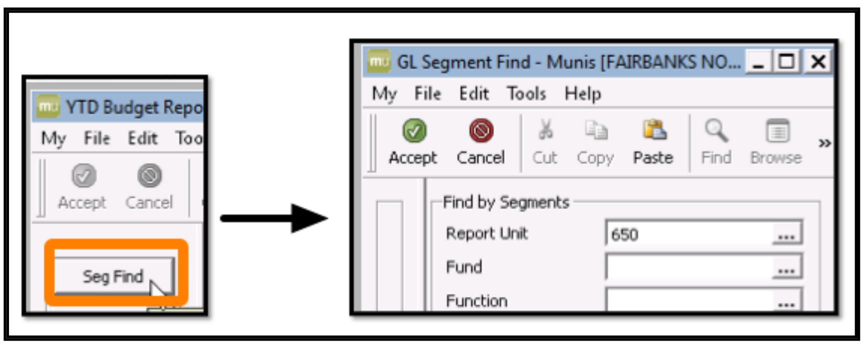
Follow these instructions to schedule a report to run at a chosen interval and receive email notification of its completion.
The **YTD Budget Report** will be used in this example, but the same principles apply to any Munis report.

Open the Report



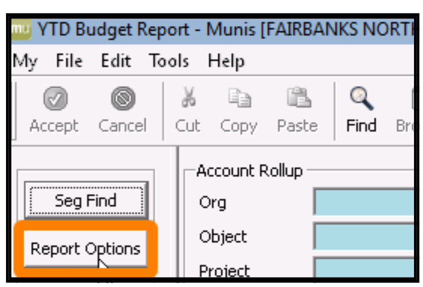
Click on the name of the report you'd like to configure to run automatically.

Seg Find



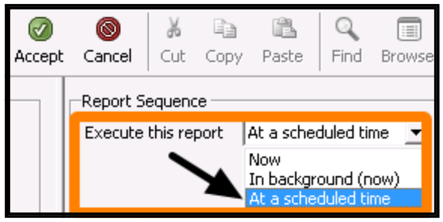
Add as many elements to your **Seg Find** as you need to get the information you will want on this recurring report, then click the **Accept** button.

Access the Report Options



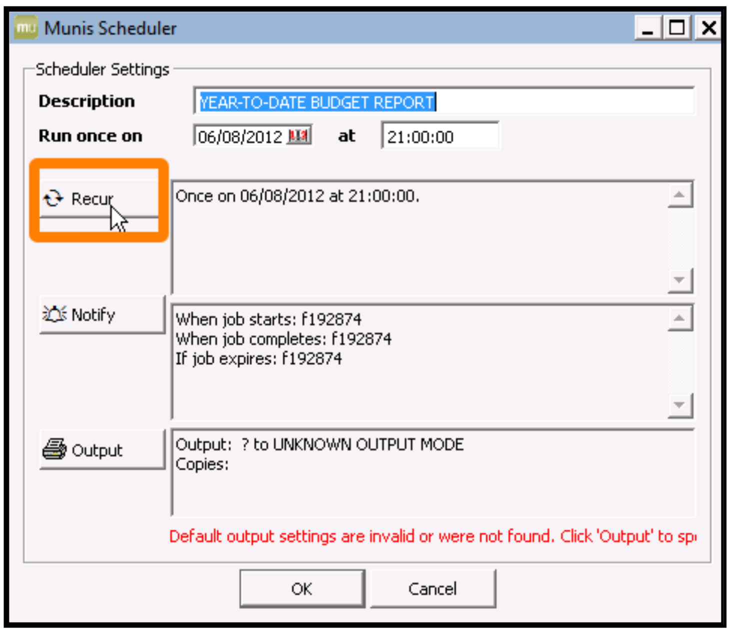
Click on **Report Options**.

Execute the Report at a Scheduled Time



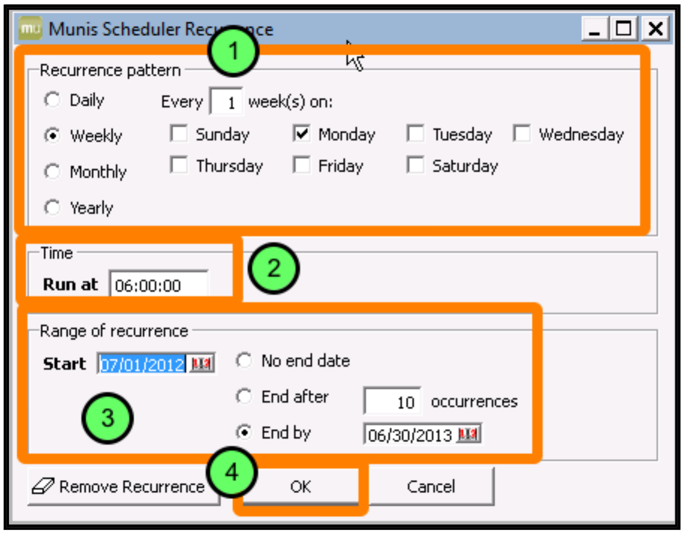
Change the default execute time to **At a scheduled time**, then choose the remainder of the report options to suit your needs. When your report content has been configured, click the **Accept** button.

Set Up the Recurring Schedule



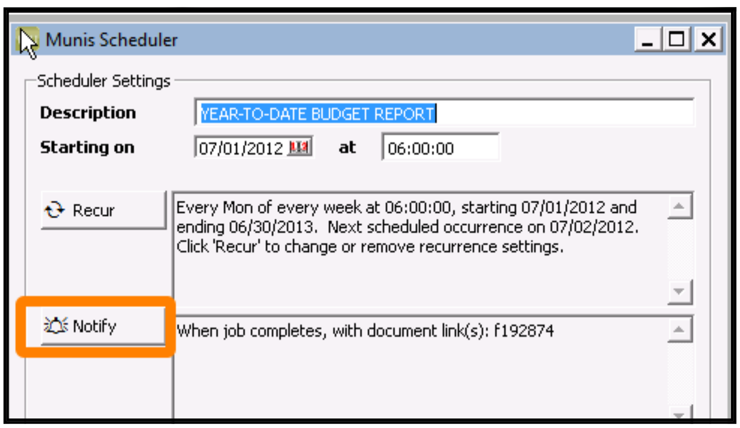
After completing the previous step, the **Munis Scheduler** pop-up will appear.
First, click on the **Recur** button.

Munis Scheduler Recurrence



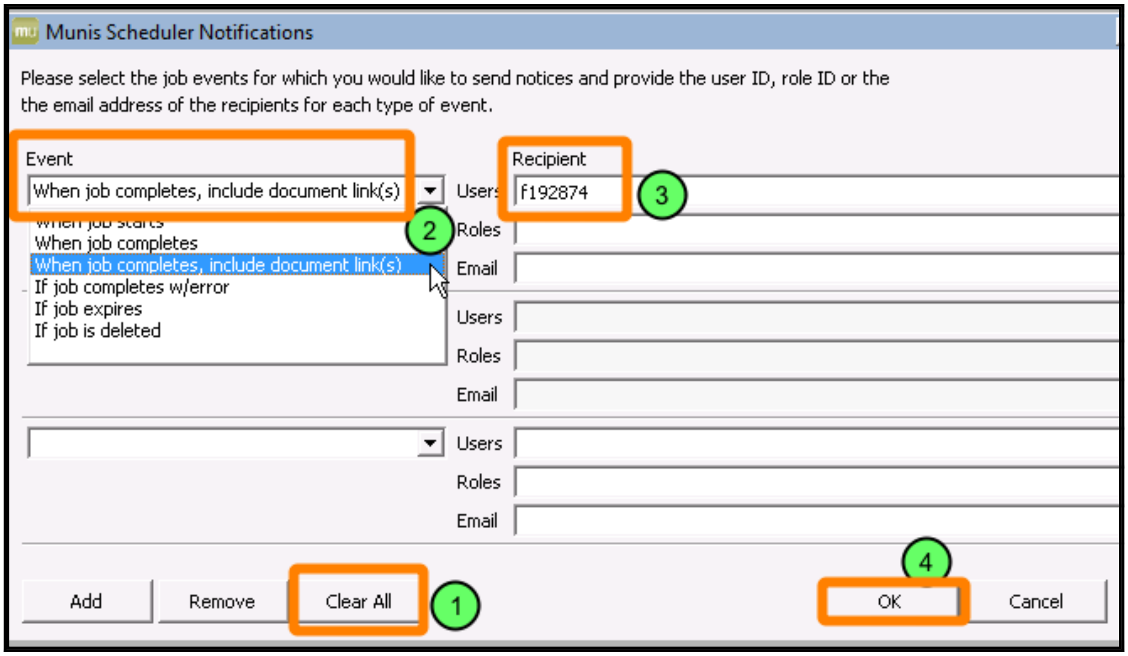
Define the recurrence pattern, the run time, and the range of recurrence to meet your needs, then click **OK**.

Notification



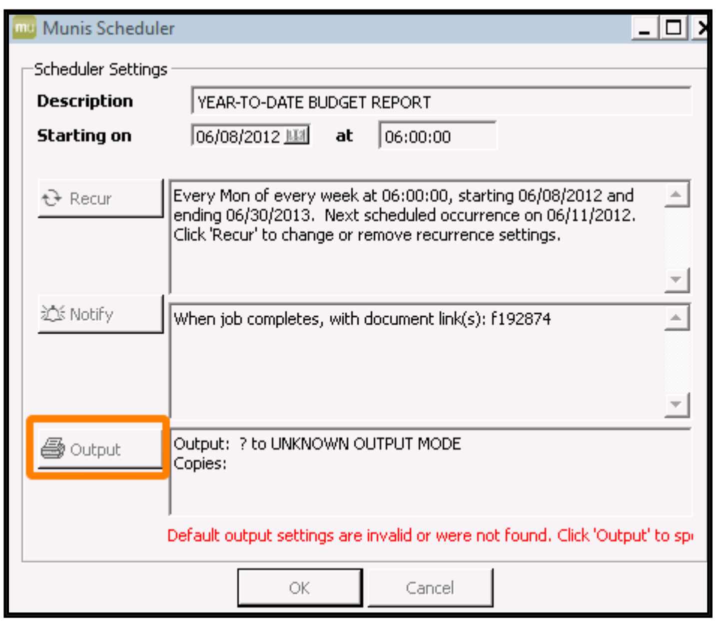
Click on the **Notify** button to set up email notifications when the report is ready to view.

Munis Scheduler Notifications



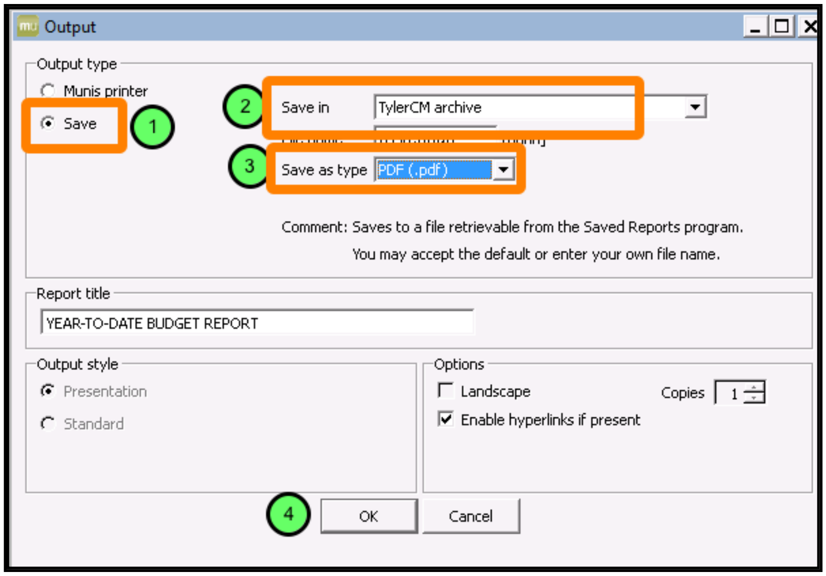
Unless you want to be notified at any other point in the process, start with the **Clear All** button. Then, in the top **Event** drop down, select the option **When job completes, include document link(s)** for ease of locating the report in Munis. Input your **f-number** for notification delivery to your email Inbox. Click the **OK** button at the bottom right of the pane (not pictured).

Output Config



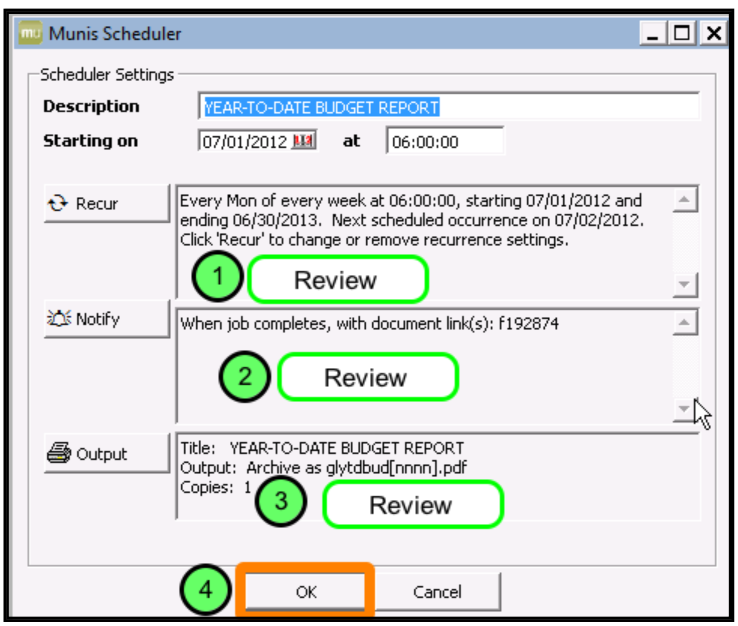
Click on the **Output** button to finish the scheduler settings.

Configure the Report Output



Change the following:
Output type = Save   Save in = TylerCM archive   Save as type = PDF (.pdf)
The PDF type choice will check the box next to **Enable hyperlinks if present.** Click **OK**.

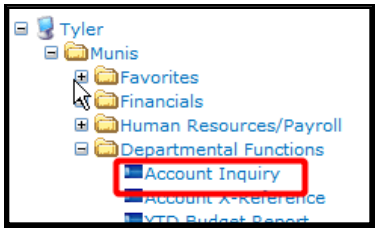
Submit Your Scheduling Configuration



Review your input and click **OK** when satisfied with the configuration.
Should you ever wish to delete a scheduled report configuration you must notify a Munis Systems Administrator (Information Systems).

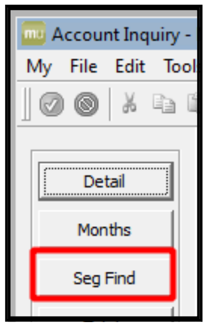
Departmental Budget Information Overview

Account Inquiry



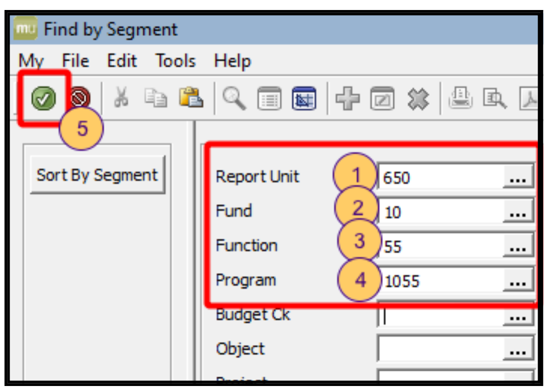
Start by clicking on **Account Inquiry.**

Use the Seg Find Feature



Click on the **Seg Find** button.

Enter Your Departmental Information

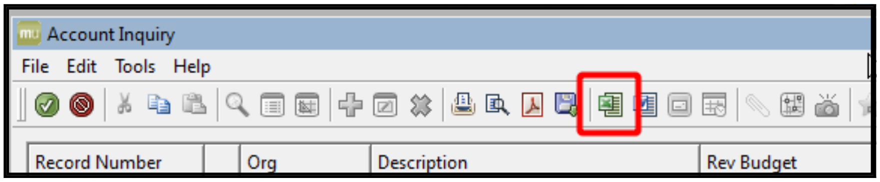


Enter at least the first two elements of the department as shown on the **Munis Long Account Structure** hand-out distributed by Nichole Wood at Munis training.
Then click on the **Accept** button.

View or browse the records

Use the arrow keys to page through the account pages one at a time, or click on the browse button to view the records as a list.

Export the Records

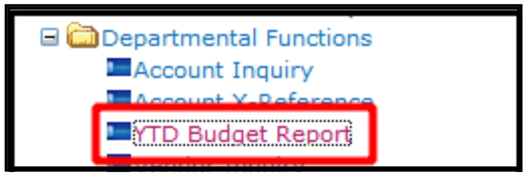


You can export the records into Excel to view them all on a spreadsheet.

YTD Budget Report - Detail

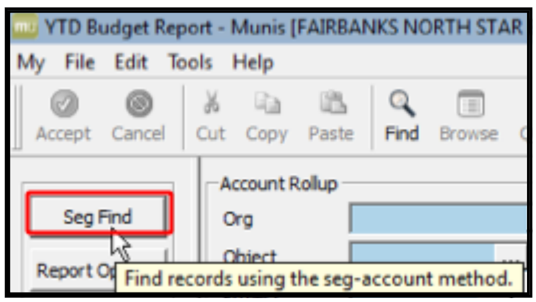
This tutorial is meant to be used in conjunction with the Financials segment of the Munis training documentation.

YTD Budget Report



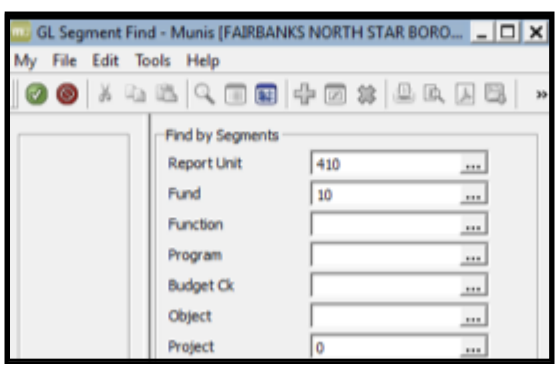
Locate and click on the **YTD Budget Report** option under Departmental Functions.

Use the Seg Find



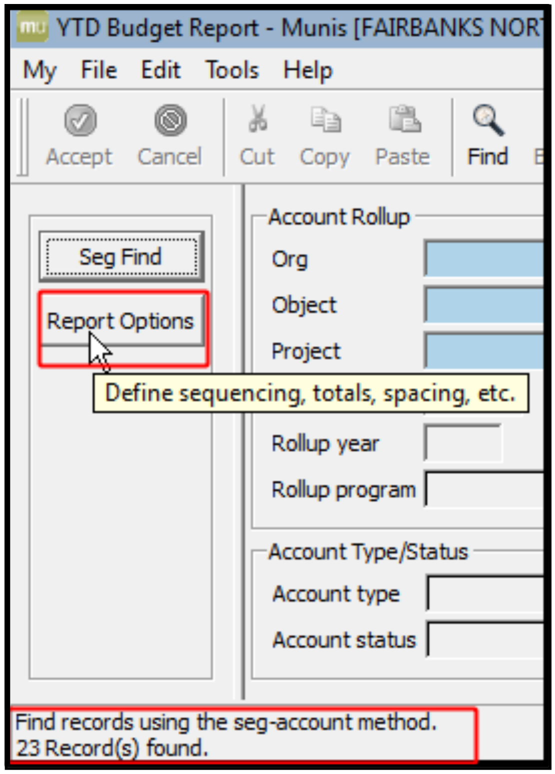
Click on the **Seg Find** button.

Complete Seg Find Screen



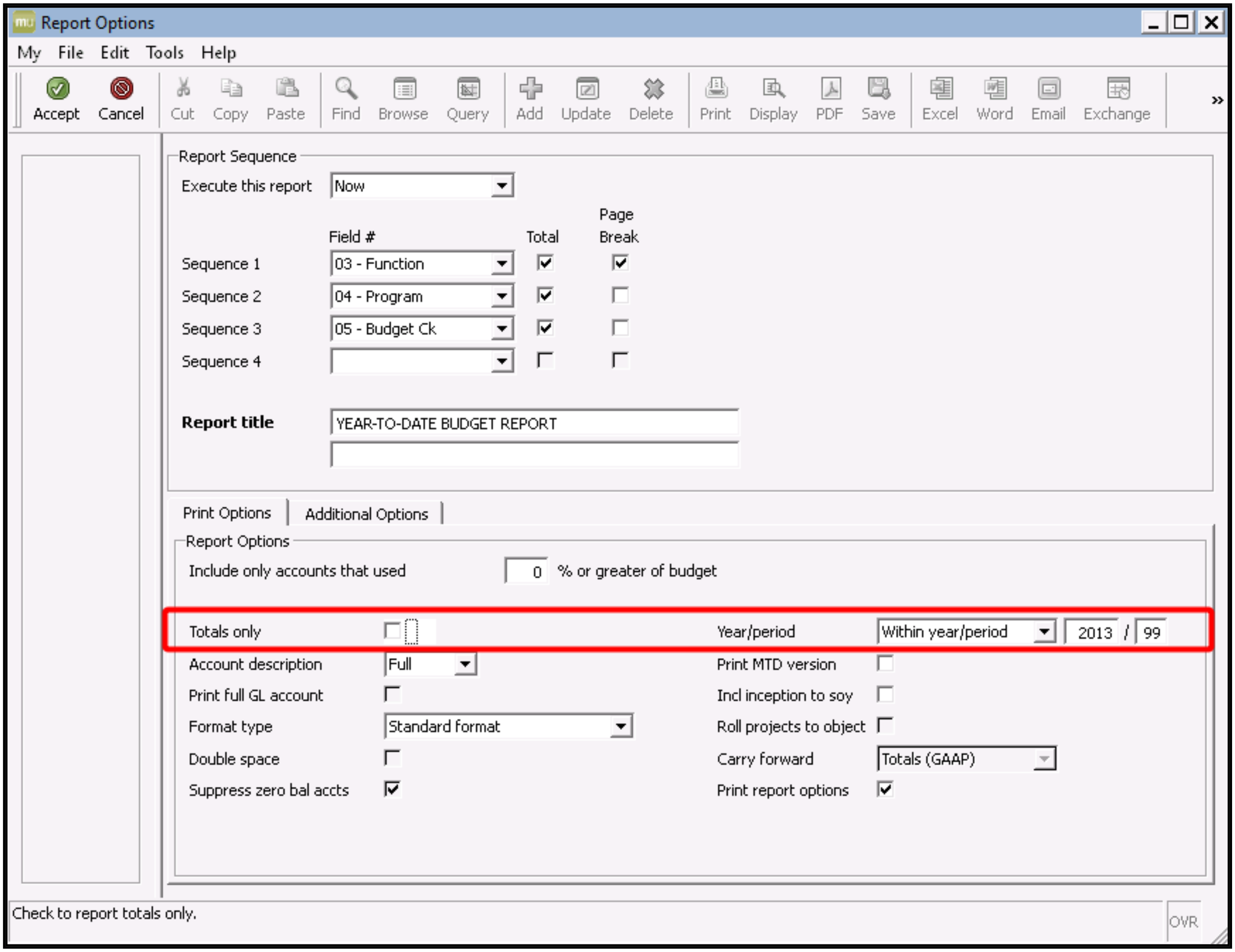
The above search would yield all of the General Fund Accounts for Lathrop High School.
Once you have entered account segments, click on the **Accept** button.

Report Options



Notice that the Seg Find returned a number of records, in this case 23.
Click on the **Report Options** to define the parameters for your report output.

Report Sequence & Print Options

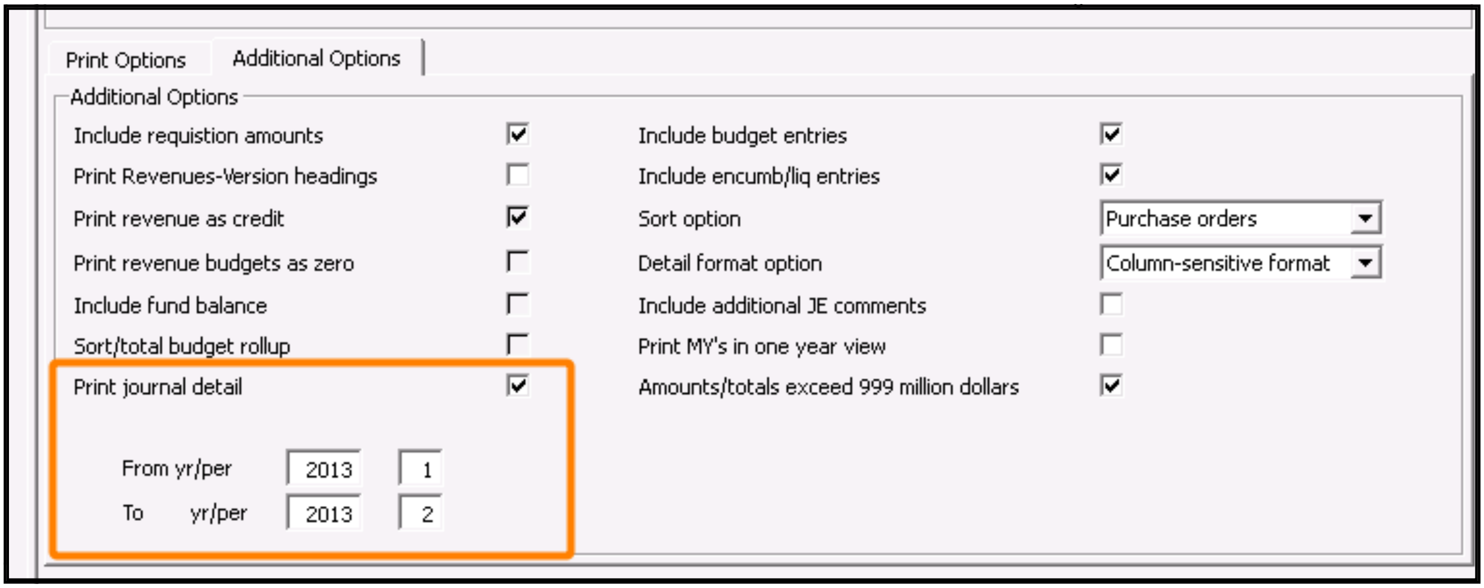


Refer to the Financials portion of the training manual for descriptions of all the fields (starting on page 36).

In order to configure a report with detail, you must uncheck **Totals only.**

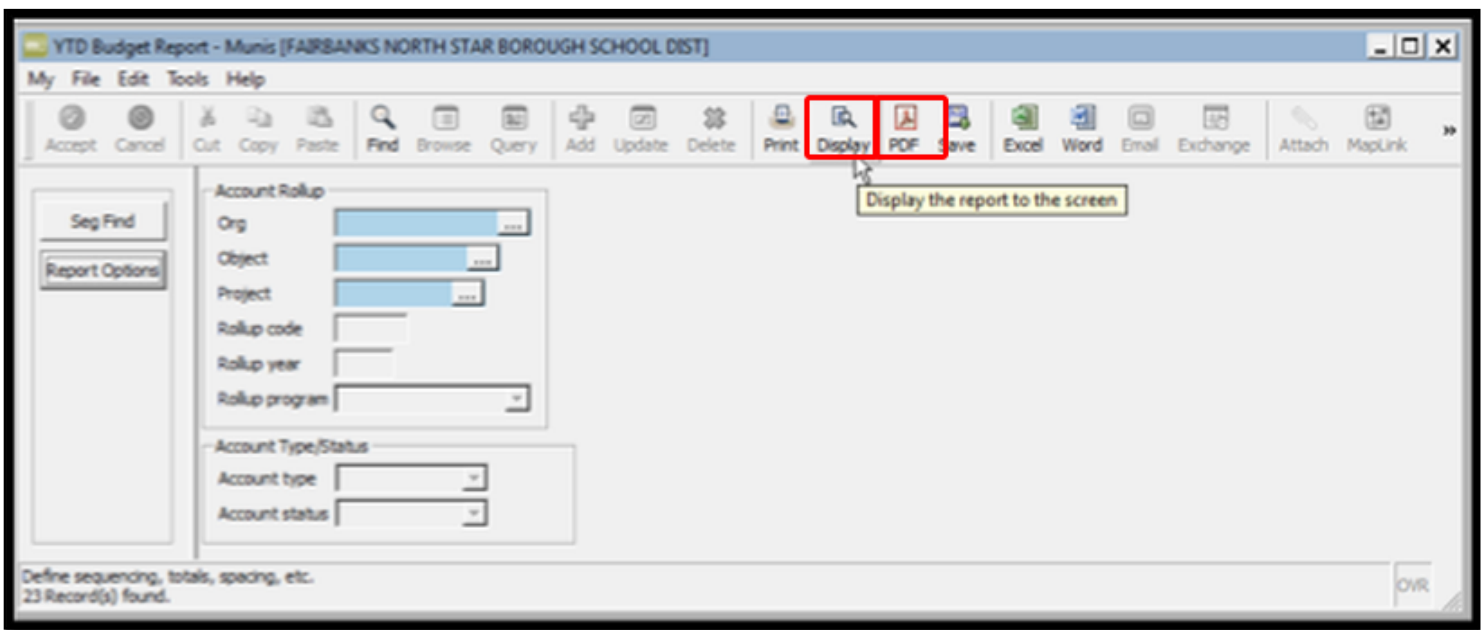
Note: The "period" referred to in the **Year/period** field refers to the month of the fiscal calendar that the report should cover. For example, 1 = July, 5 = November. The period = 12 will yield the entire year.

Additional Options



Unchecking the **Totals only** box on the **Print Options** tab allows you to opt to **Print Journal** detail for a specified period.
After clicking on the **Accept** button, **close the Report Options screen**.

Viewing the Report



After closing out of the Report Options page, you may choose to display the report to your screen by clicking on the **Display** button or click the **PDF** button to view your report as a pdf.

Human Resources

Personnel Actions Entry

When an admin secretary is contacted by an employee requesting a change or addition to the individual's record that affects status, pay, or position, the secretary requests that the employee complete and sign the proper form and coordinate it through the employee's supervisor. Once completed and signed, the admin secretary scans and saves a digitized copy of the form, letter or email. The copy will be used as part of the PA when it is initiated.

Please Note: Personnel Actions should only be utilized for the "Action Codes & Areas Covered" noted below. Creating a Personnel Action Entry does not create a pay record. *Personnel Action Entries will not be entered for ordinary Sick Leave, Personal Leave, or Annual Leave. However, these three leave types should be noted for payroll purposes in your Munis Time Entry for the appropriate time frame.*

Personnel Actions authorized for use at the school or department level

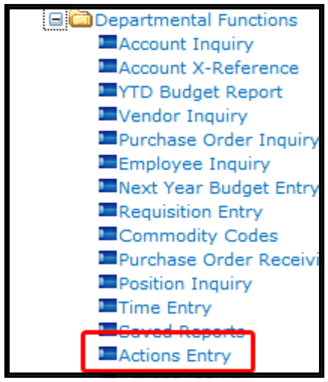
Personnel Action Code	Reason/Authorization Code
LV – LEAVE (LWOP or LOA)	DO NOT USE A REASON-LEAVE BLANK
LV – LEAVE (Administrative Leave)	LADM – Administrative Leave
LV – LEAVE (Family Medical Leave-10 days or longer)	LFMR – Family Medical Leave Request
LV – LEAVE (Military Leave)	LML – Military Leave
LV – LEAVE (Professional Leave)	LPRO – Professional Leave
TERM – TERMINATE EMPLOYMENT	DO NOT USE A REASON-LEAVE BLANK
SAL – SALARY CHANGE (SAS Contract Approval)	SAS – Student Activity Sponsorship
SAL – SALARY CHANGE (SAS Payment)	SASP – SAS Payment Authorization
SAL – SALARY CHANGE (MOA Approval)	SMOA – MOA Contract Approval
SAL – SALARY CHANGE (MOA Payment)	SMOP – MOA Payment Authorization
SAL – SALARY CHANGE (Stipend Approval and Payment)	STIP – Stipend
SAL – SALARY CHANGE (Extended Contract)	SEXT – Extended Contract
SAL – SALARY CHANGE (Job Share)	SJS – Job share

Digital Documentation Requirements

Action Code	Documents Required
Request for Leave: LV-Leave	
Military Leave	Set of Orders and Change of Status Form
Leave Without Pay	Change of Status Form
Family Medical Leave	Change of Status Form
Leave of Absence (more than 30 days)	Change of Status Form
Administrative Leave	Change of Status Form
Professional Leave	Change of Status Form
Notice of Termination: TERM-Terminate Employment	
Resignation	Letter/Email from the Employee
Retirement	Letter/Email from the Employee
Request for Change in Salary: SAL-Salary Change	
School Activity Sponsorship (SAS) Contract Approval	SAS Contract
SAS Payment	SAS Contract
Memorandum of Agreement (MOA) Approval	Supplemental Pay Form
MOA Payment	Supplemental Pay Form
Stipend Approval and Payment	Supplemental Pay Form
Extended Contract Approval and Payment	Supplemental Pay Form
Job Share	Job Share Request Form

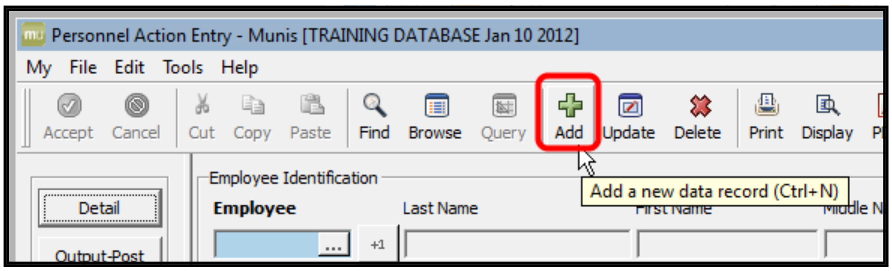
Follow the instructions in the tutorial entitled "MUNIS::Saving Scanned PDFs" to make the required document available in the Munis environment.

Actions Entry



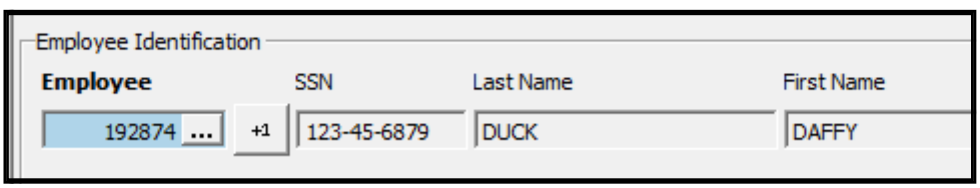
Begin the Personnel Action by clicking on **Actions Entry.**

Add a New Data Record



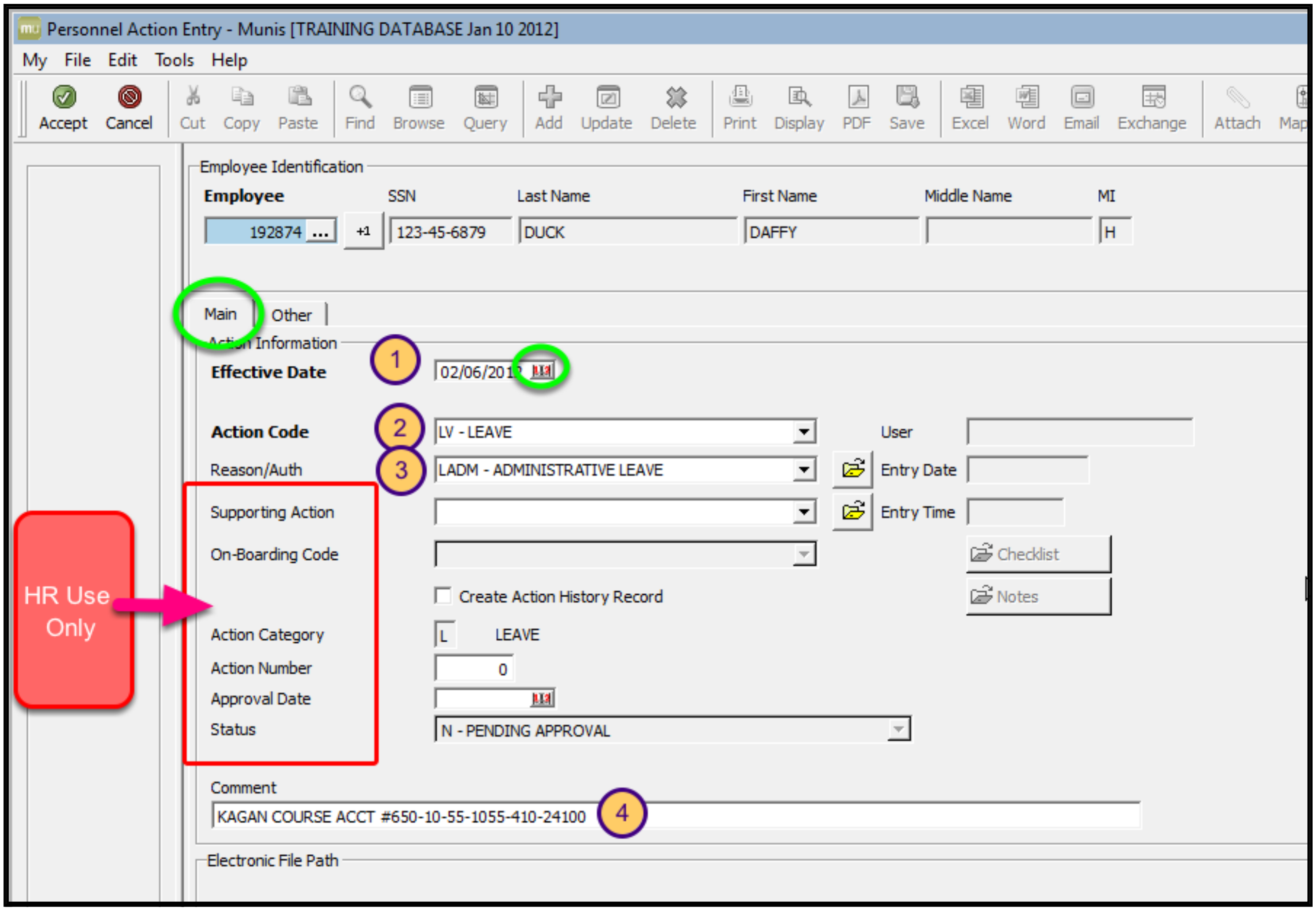
Click on the **Add** button.

Employee Identitification



Enter the employee's f-number, or click on the ellipses and filter the results to find the employee. **Tab** to the next field to auto-fill the remaining employee identification information. You might get errors at the bottom of the screen or pop-ups warning you that additional Personnel Actions are pending for this employee. In most cases, there is no conflict between the pending actions and it is acceptable to proceed.

Main Tab: What to Fill In



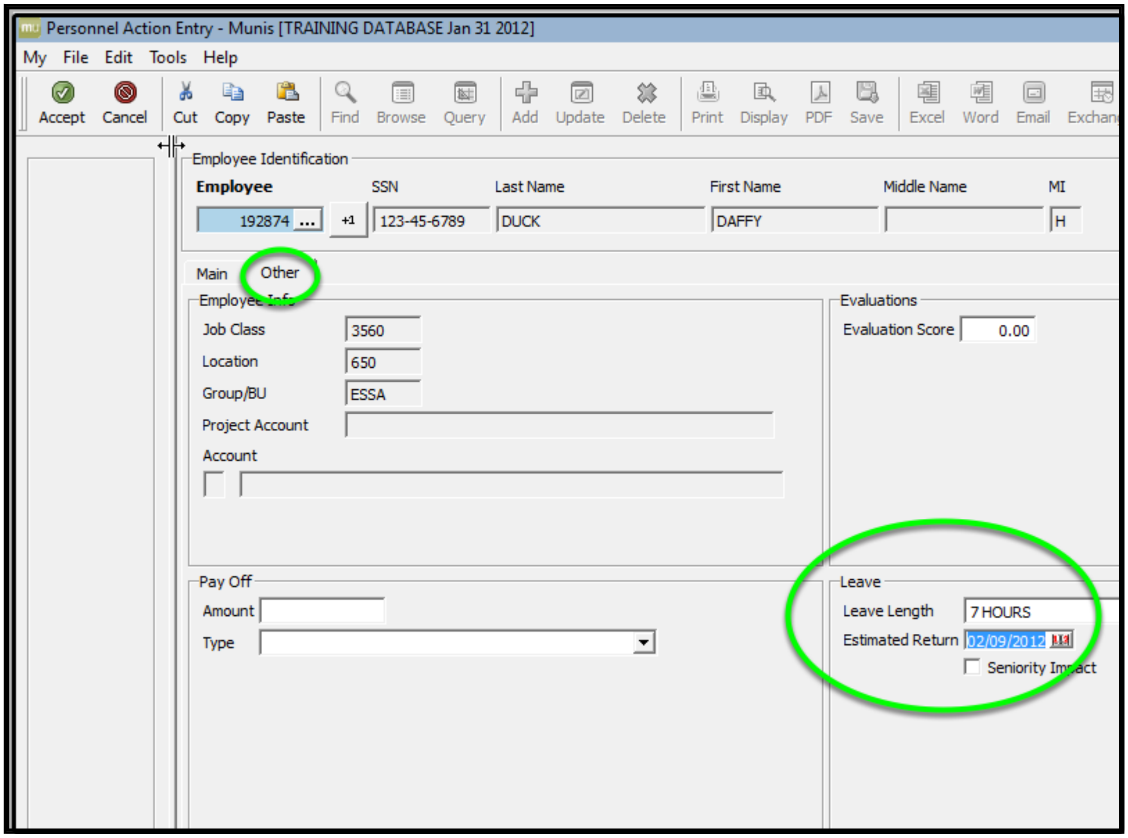
Tab from field to field.
1. Effective Date = the date that the personnel action begins.
2. Action Code (choose according to chart in Introduction to this lesson):
LV - Leave;
SAL - Salary Change; or,
TERM - Terminate Employee.
3. Reason/Auth (as/if required by the chart in the introduction to this lesson).
- Shortcut: Highlight the Reason/Auth field and then type in 2 letters of the abbreviation of the option you want.
The selection will load into the field (in the above example, you'd type in LA). Use your up and down arrows
to find nearby reasons if the one that pops in is close but not exactly correct.
4. Brief comment. Include the account number that this personnel action will be charged to, as appropriate.

Please Note: Be careful when choosing the Action Code and Reason/Auth! Once you have accepted your entry (using the green check mark button), those two items can NOT be updated/changed. To correct an erroneous selection for Action Code or Reason/Auth, you must

delete the inaccurate Personnel Action and begin again.

For Leave actions only, proceed to the Other tab. For Salary Change and Terminate Employee, skip one step to "Accept Your Input."

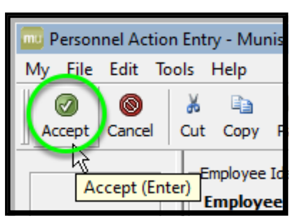
Other Tab: What to Fill In



For a LEAVE REQUEST ONLY:
In the Lower Right-hand Corner:
1. Enter the leave length (indicate if it is a number of DAYS or HOURS).
2. The Estimated Return is the date when you expect the employee back from leave.

Only the **Action Code** of **Leave** requires input on the **Other** tab. **SAL** and **TERM** only require input on the **Main** tab.

Accept Your Input

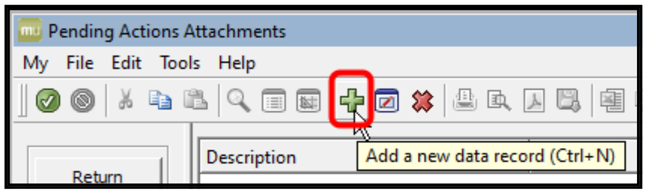


Click the **Accept** button to save your input.

Attach the Required Documentation

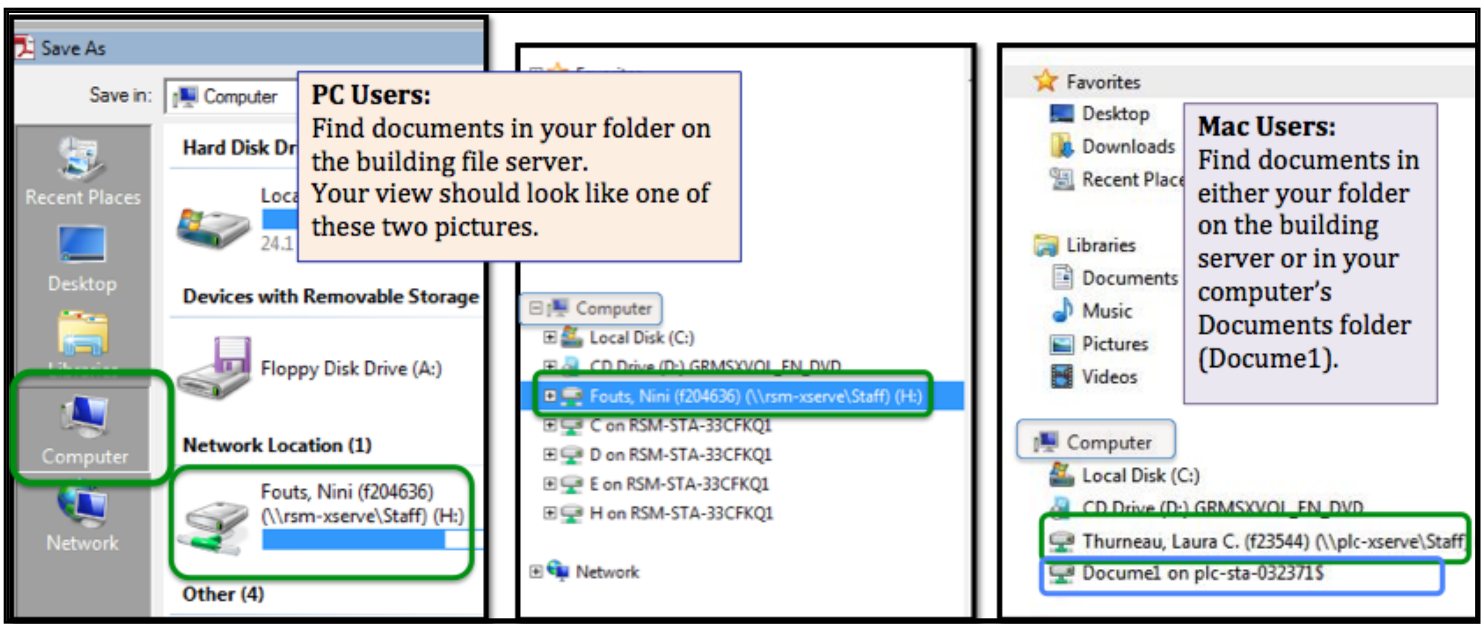
Click the **Attach** button (paperclip). To make the icon names appear, right-click on the tool bar, scroll to the bottom of the list and click on Enable Text.

Add a Document



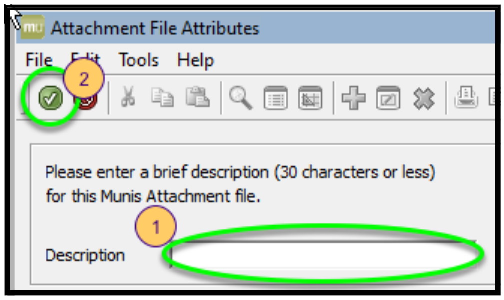
Click on the **Add** button.

Browse for the Appropriate Document



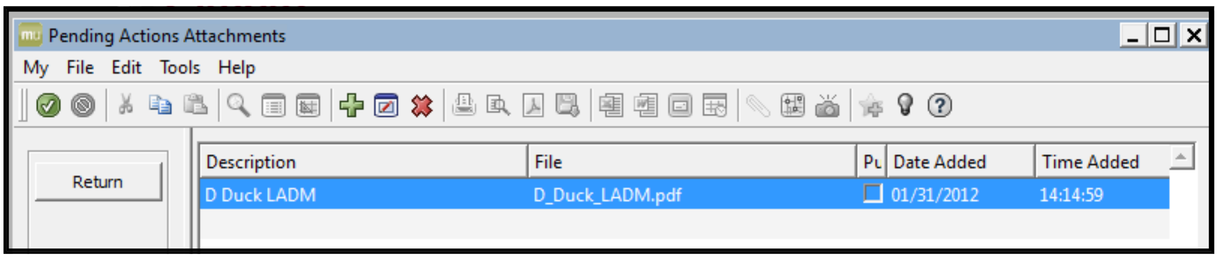
Look in your file on your building server (Mac users might look in their "Docume" folder). Double-click on the document you want to attach (or single click and then hit the Open button). Please see the tutorial entitled "MUNIS::Saving Scanned PDFs" for more detail on how to get the document into a file that is accessible on the Terminal Server.

Enter a Brief Description



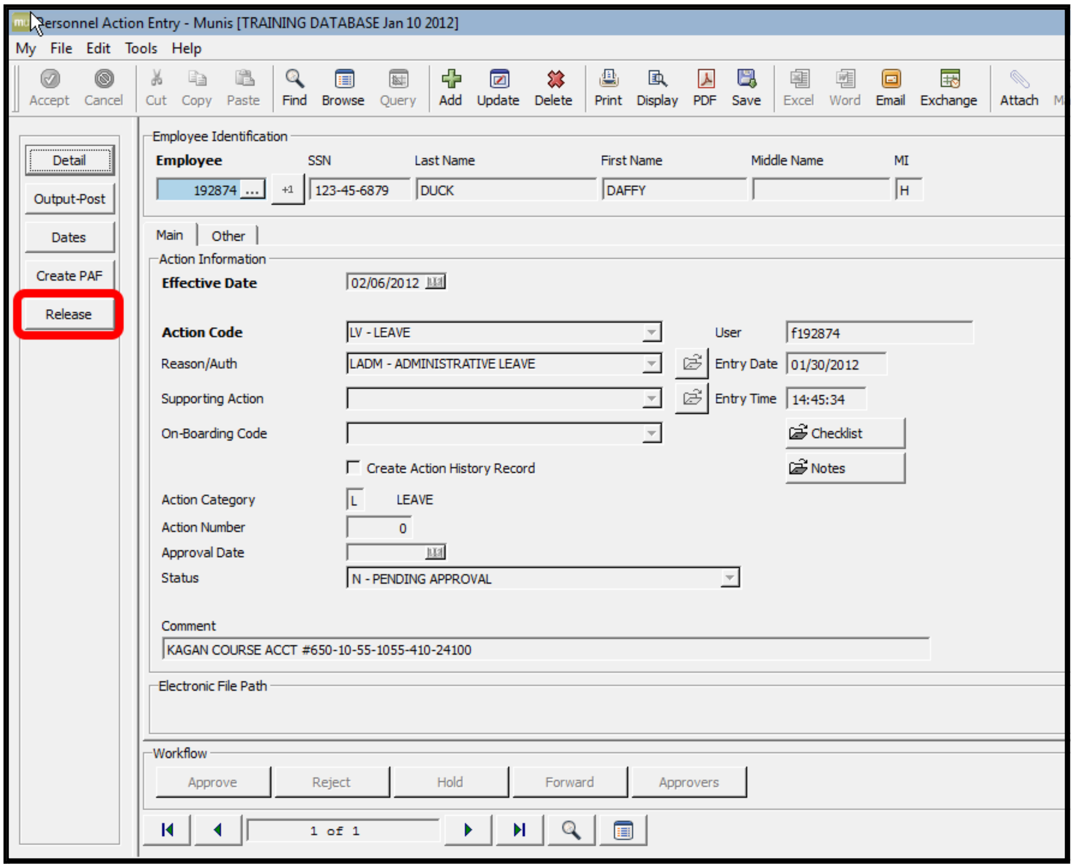
1. Enter the brief description.
2. **Accept** the input.
3. *Do not check* the box to make the document available to non-Munis users.

The Document is Attached



There are several options at this point.
To add another document to this personnel action, click on the **Add** button.
To view the document, click on the **Accept** button.
To close this window and get back to your Personnel Action screen, either click on **Return** or the black **X** in the upper right-hand corner of the Attachments pane.

Review and Release

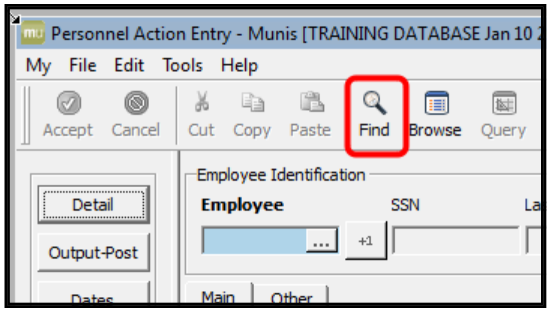


Review the Action Entry for completeness and accuracy.
If you need to check to make sure that you've attached the required documentation, click on the **Attach** button again to view the pdf(s).
When you are satisfied that the Personnel Action Entry is accurate and complete, click on the **Release** button.

Where Will It Go?

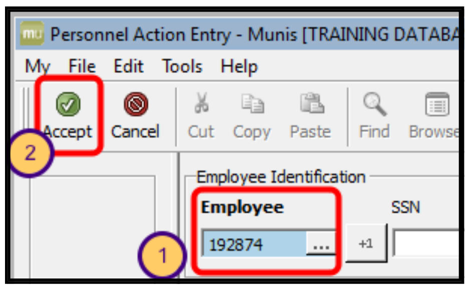
Click on the Approvers tab if you wish to see the path that this Personnel Action Entry will take.

Finding a Saved (Accepted) Personnel Action Entry



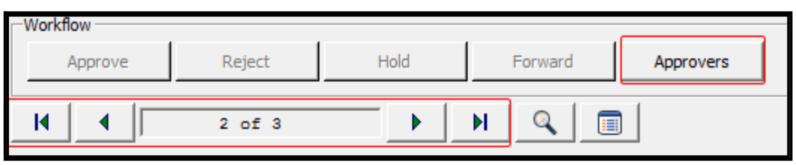
If you need to review a Personnel Action Entry, open that screen in Munis, then click on the **Find** button (magnifying glass).

Find Personnel Action Entries for an Employee



Enter the employee f-number.
Click on the **Accept** button.

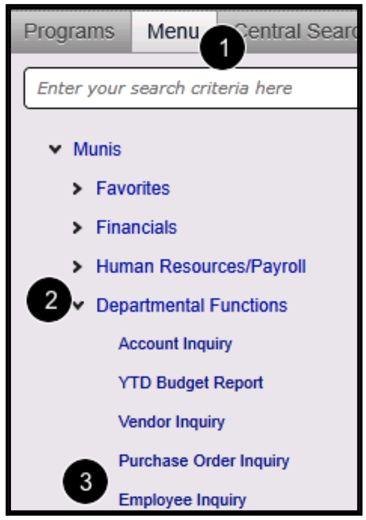
Multiple Personnel Action Entries



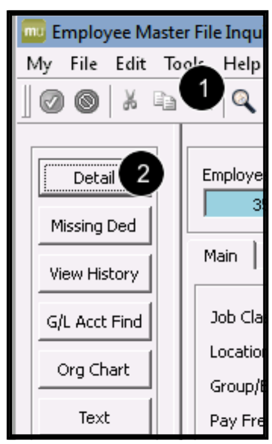
Once you've accepted the employee number, all personnel action records associated with this employee will display. Multiple records, if any, are indicated by a number of pages that can be scrolled through at the bottom of the pane.
Check the approval status of the record by clicking on the **Approvers** button.

Employee Actions Inquiry

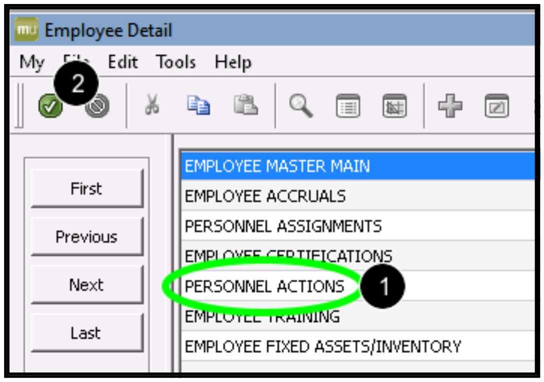
Personnel Actions Inquiry is no longer a menu option in the most recent version of Munis, you now access this information through employee detail. Please see instructions below.



1. Select the **Menu** tab
2. Departmental Functions
3. Employee Inquiry



1. Select the **finder tool** to search by "f" number or name.
2. Once you have the employee, select **Detail.**



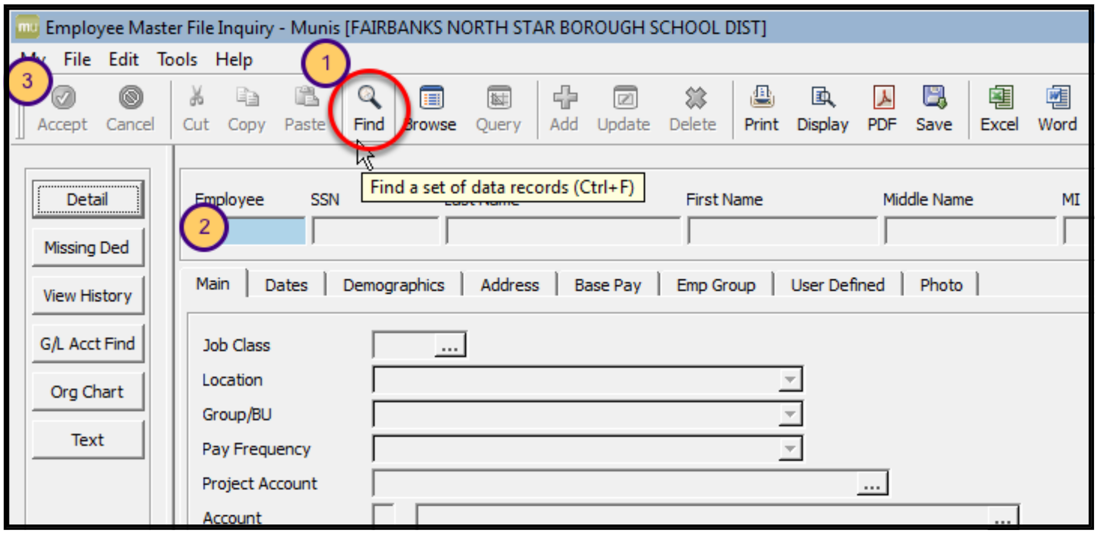
1. Select Personnel Actions.
2. Then the green check mark for accept.

The employee and their various Personnel Actions will be displayed.

Accessing Employee Accruals

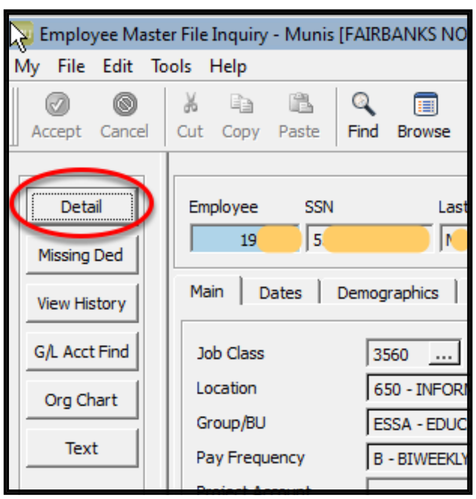
This document describes how to find an employees leave balances.

Departmental Functions > Employee Inquiry



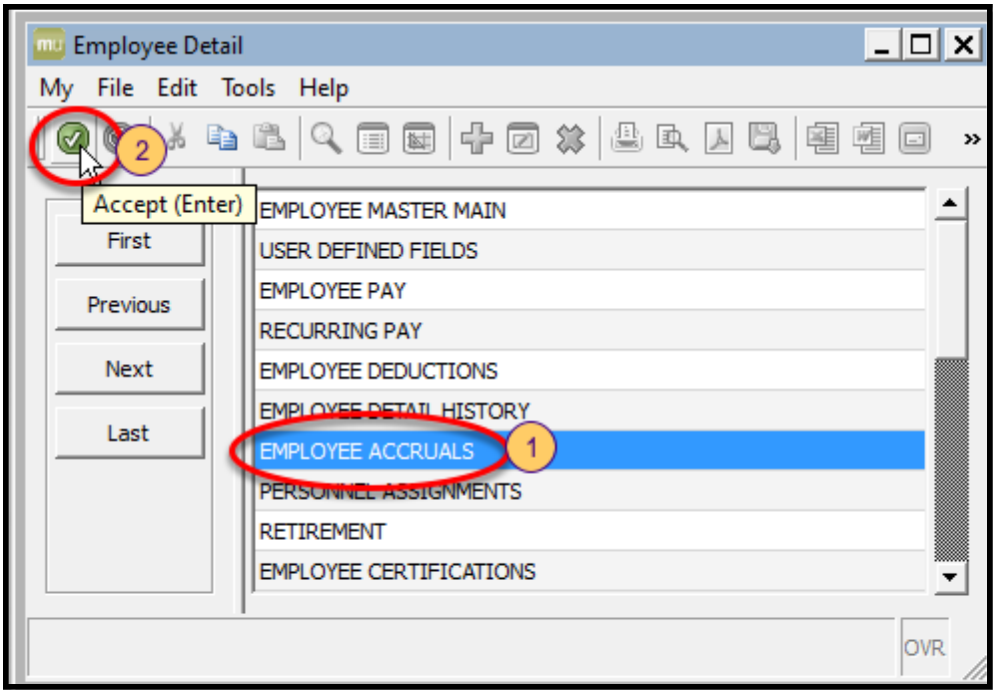
1. Begin by clicking on the **Find** button.
2. Enter the emplyee's f-number (without the f).
3. Click on the **Accept** button. The employee information will fill in.

View the Detail



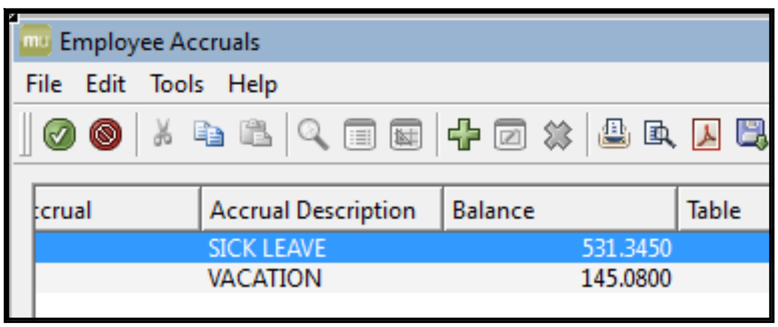
Click on the **Detail** button.

Select Employee Accruals



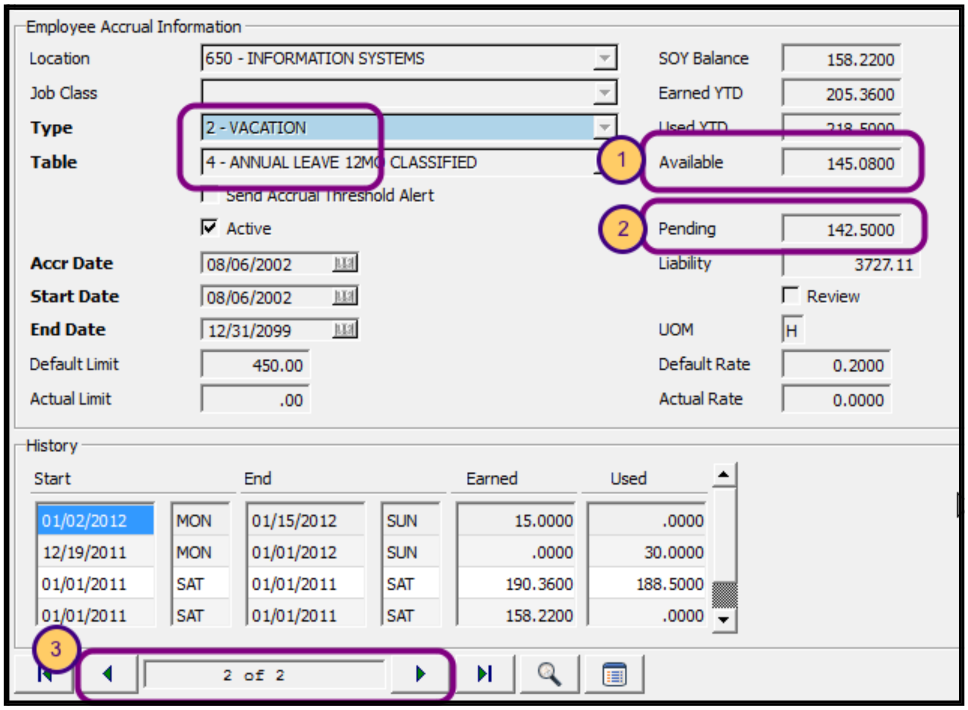
1. Select the **Employee Accruals** option.
2. Click on the **Accept** button.

View in place or select the leave type from the list.



In this example, the **Balance** column was dragged next to the **Accrual Description** column for ease of viewing.
Alternatively, click on the type of leave and then the **Accept** button.

The Full Detail View



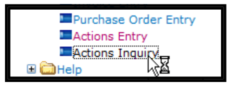
This example shows that the employee has just over 145 hours of annual leave and that 142.5 hours have been encumbered through the FNSBSD Munis employee self serve feature for future time off.

1. Available hours.
2. Pending hours (encumbered through the FNSBSD Munis employee self serve).
3. Page forward or back to view the other type of leave, in this case, because we are viewing the vacation time, we can change pages to view the detail for sick leave.

Originator's Approved Actions Digest

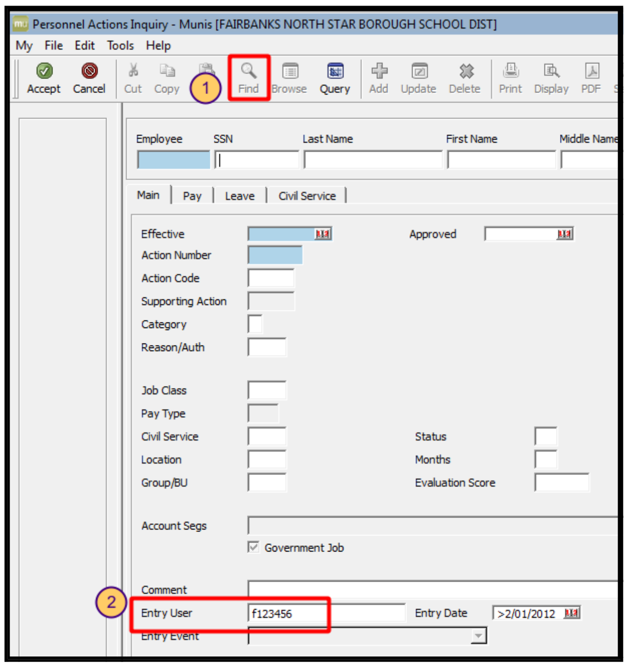
Browse a list of all the actions you have entered that have been approved and output-posted to Munis Live.

Go to Actions Inquiry



Start by clicking on **Actions Inquiry**.

Find the records



1. Click on the **Find** button.
2. Enter your f-number in the "**User**" field (lower case f).

Narrow the results by entering an **Entry Date** (indicate "before" with < or "after" with the > symbol; see example).
When you have finished putting in the criteria for your find, click on the **Accept** button.

View the records

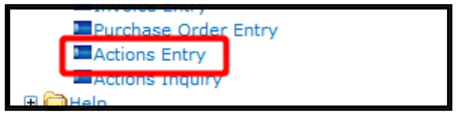
In this example, there are 17 personnel actions entered by this user that have been fully approved and output-posted.
Click on the **Browse** button to view the list, or page through the entries to view each record

individually.

Originator's Pending Actions Digest

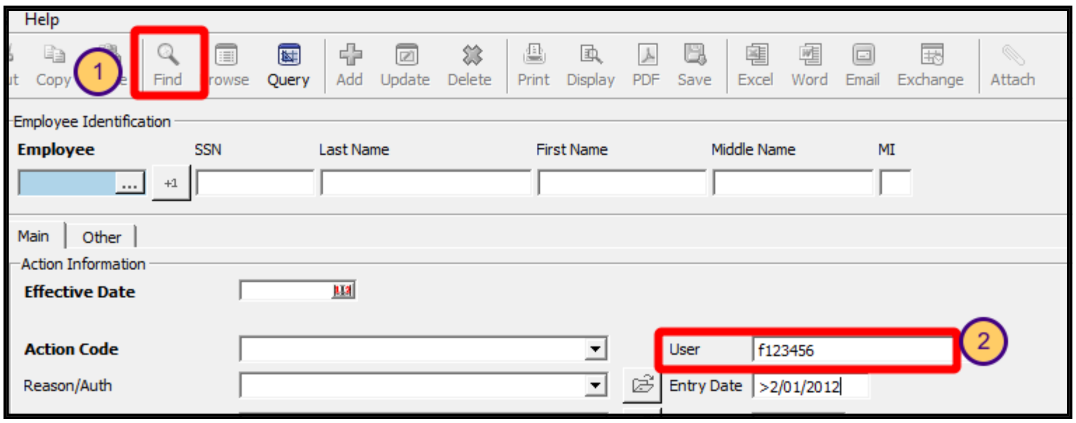
Browse a list of all the actions you have entered that are pending approval or pending output-posting.

Go to Actions Entry



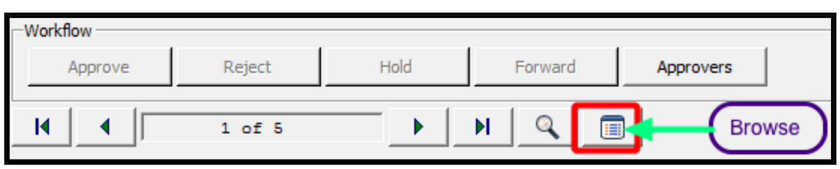
Start by clicking on **Actions Entry**.

Find the records



1. Click on the **Find** button.
2. Enter your f-number in the "**User**" field (lower case f).
You may enter additional information to narrow down the list, such as: Entry Date (narrow your results, if you wish, by using the > symbol to pull records entered *after* a specific date, or the < symbol for all records entered *before* a specific date); Status; or Action Category.
3. When you have finished putting in the criteria for your "**Find**," click on the **Accept** button.

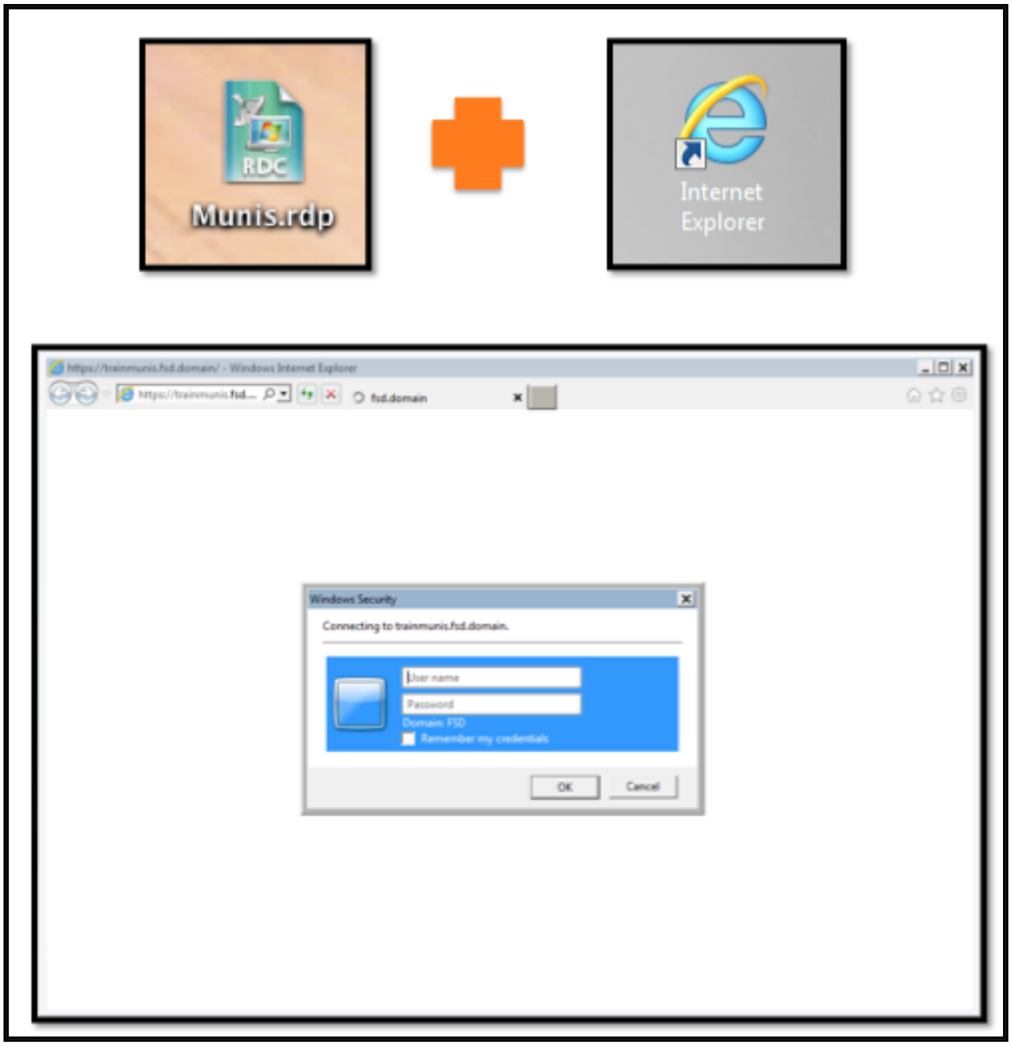
View the records



This user has entered five personnel actions that have not been fully completed.
Click on the **Browse** button to view the list, or page through the 5 entries to view each record individually.
Click on the **Approvers** button for each record to see where the action is in the approval process.

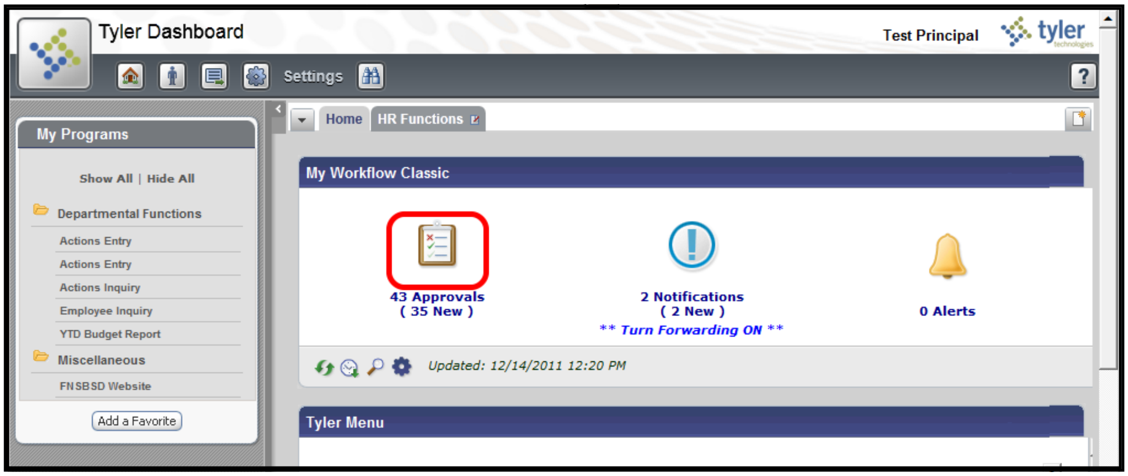
Payroll

Log in to Munis



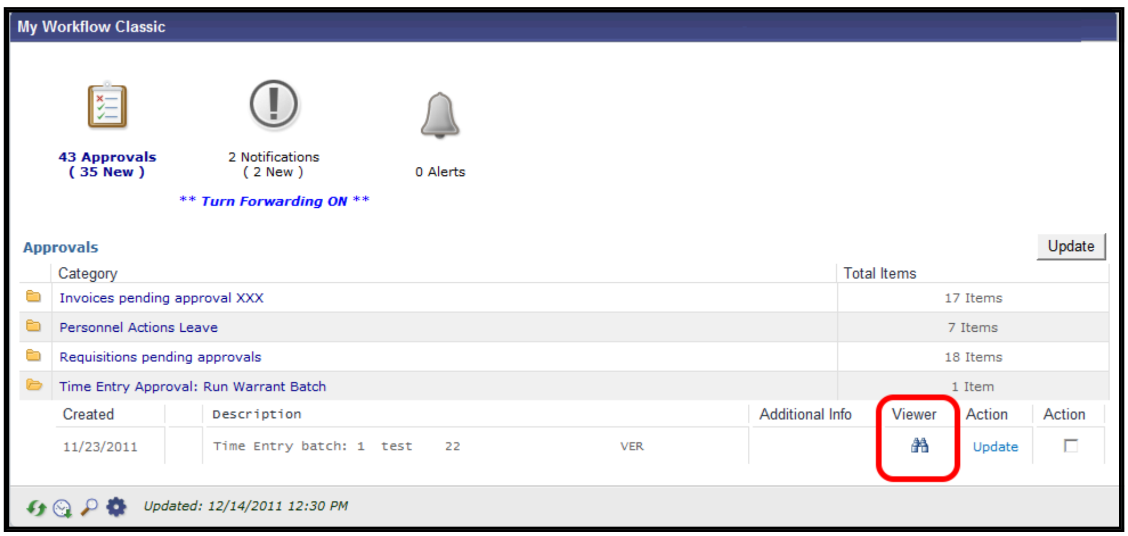
Use your desktop icon shortcut to reach the Munis terminal server.
Once you have connected to the terminal server, double-click on the Internet Explorer icon.
Enter your f-number and password to log in in to Munis.

The Workflow



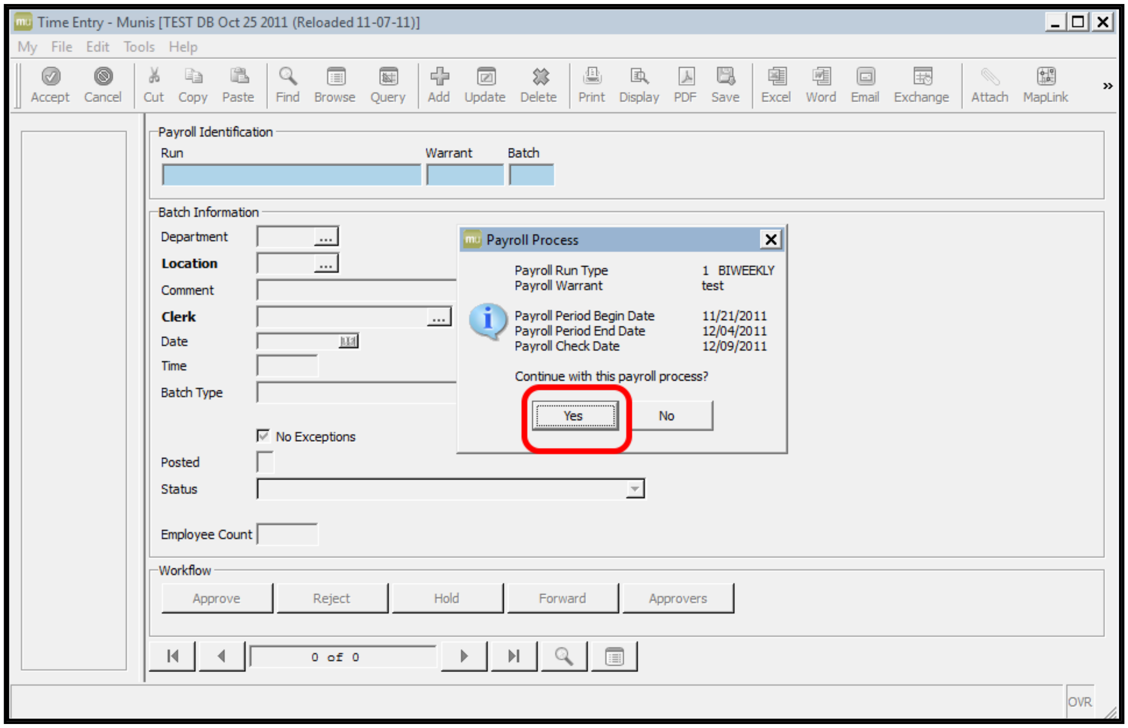
This sample principal has 43 approvals, 35 of which are new.
Single click on the approvals icon to view the list of approvals.

My Workflow Approvals



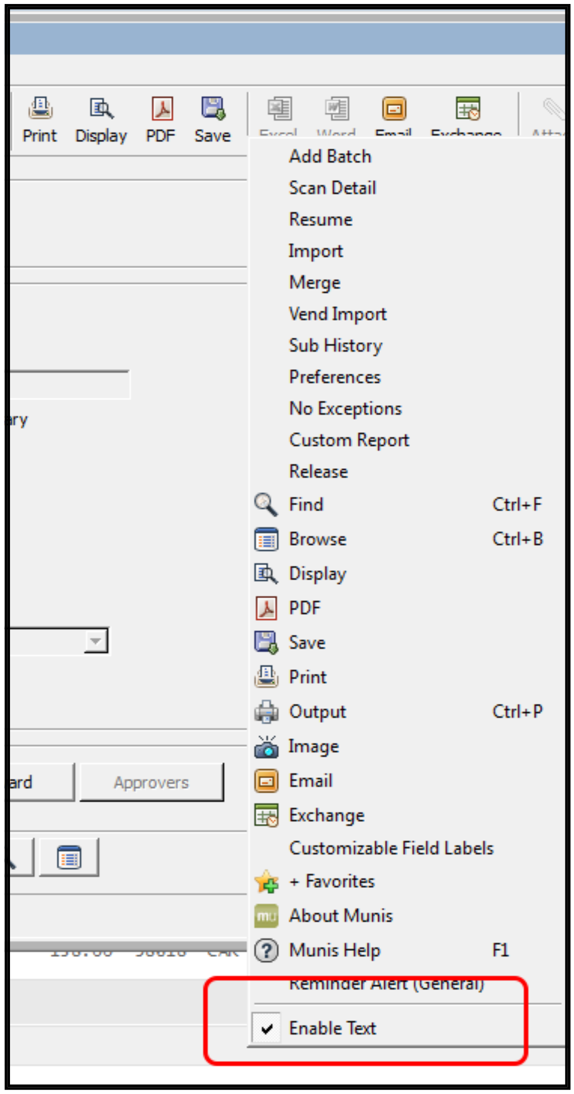
Click on the category **Time Entry Approval: Run Warrant Batch** to open that folder.
Click on the Viewer icon (binoculars) to review a batch.

Verify the Pay Period Dates



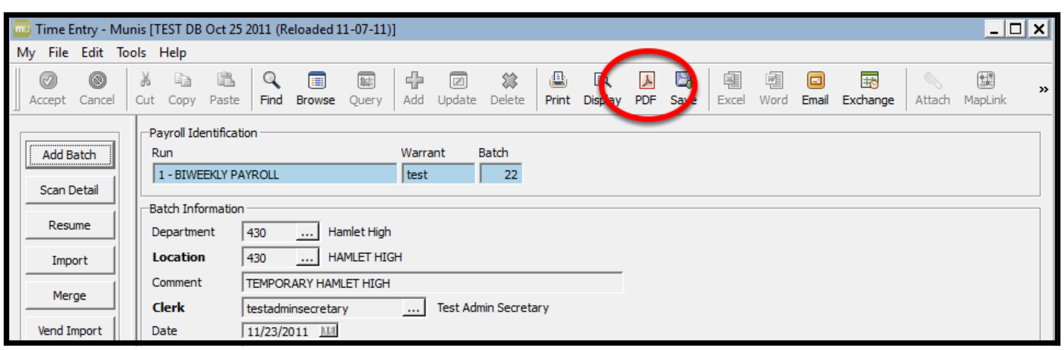
If the pay period dates are correct, click **Yes**.
If incorrect, contact the Payroll Department.

Enabling Text in the Tool Bar



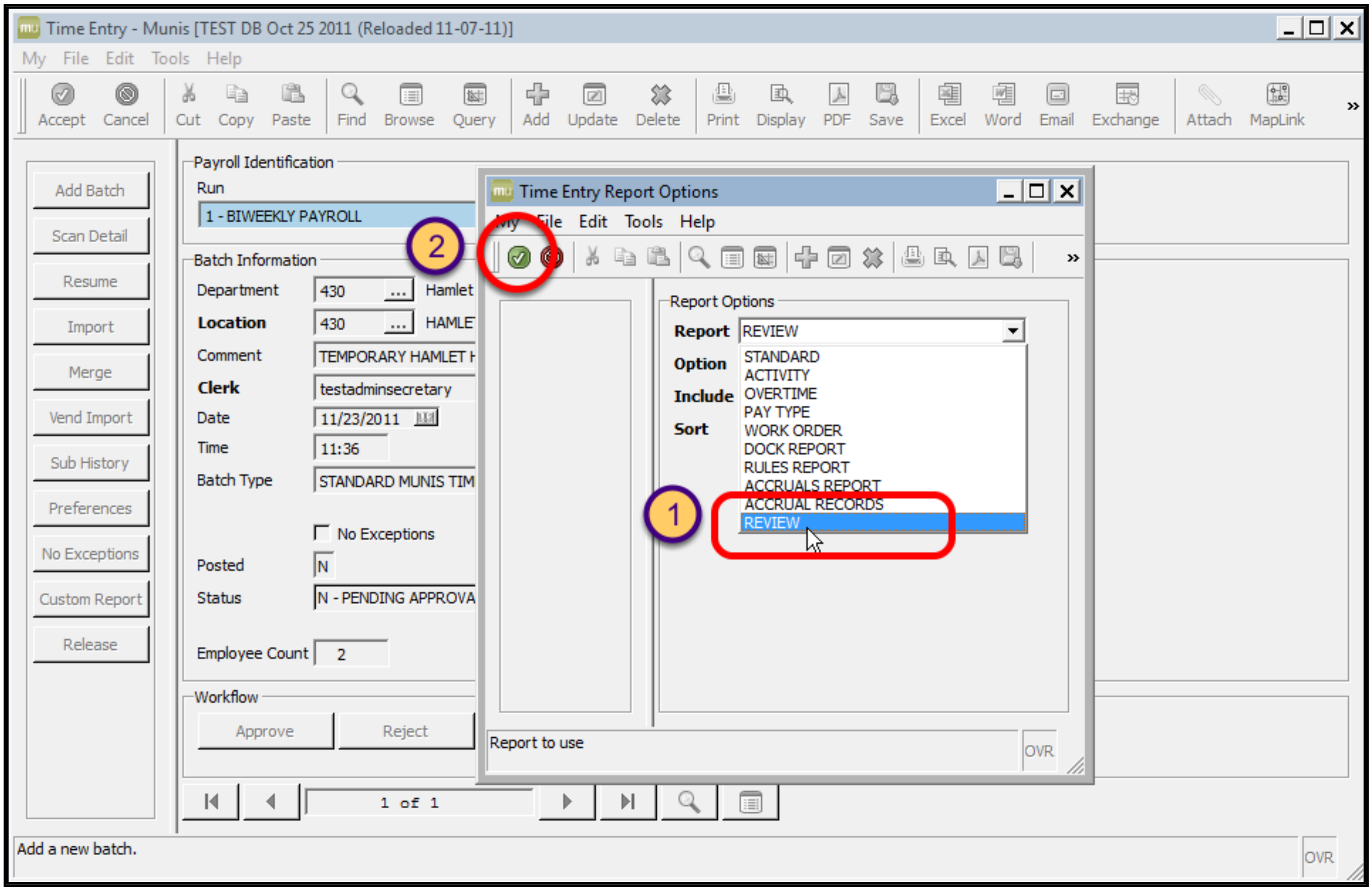
If your Munis page opens without labels for the buttons on the tool bar, right-click on the tool bar and choose **Enable Text** to view the button labels.

Review Time Entered



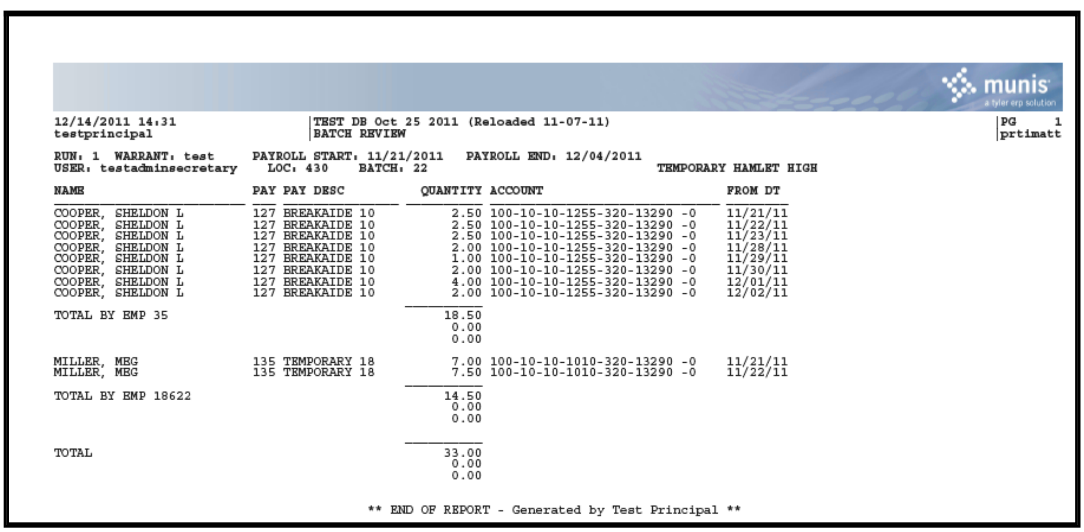
Click on the **Adobe PDF** button.

Run the Review Report



The default report style is Standard. Change this option to **Review** using the drop-down menu. Click on the green **Accept** button.

Review the PDF Report



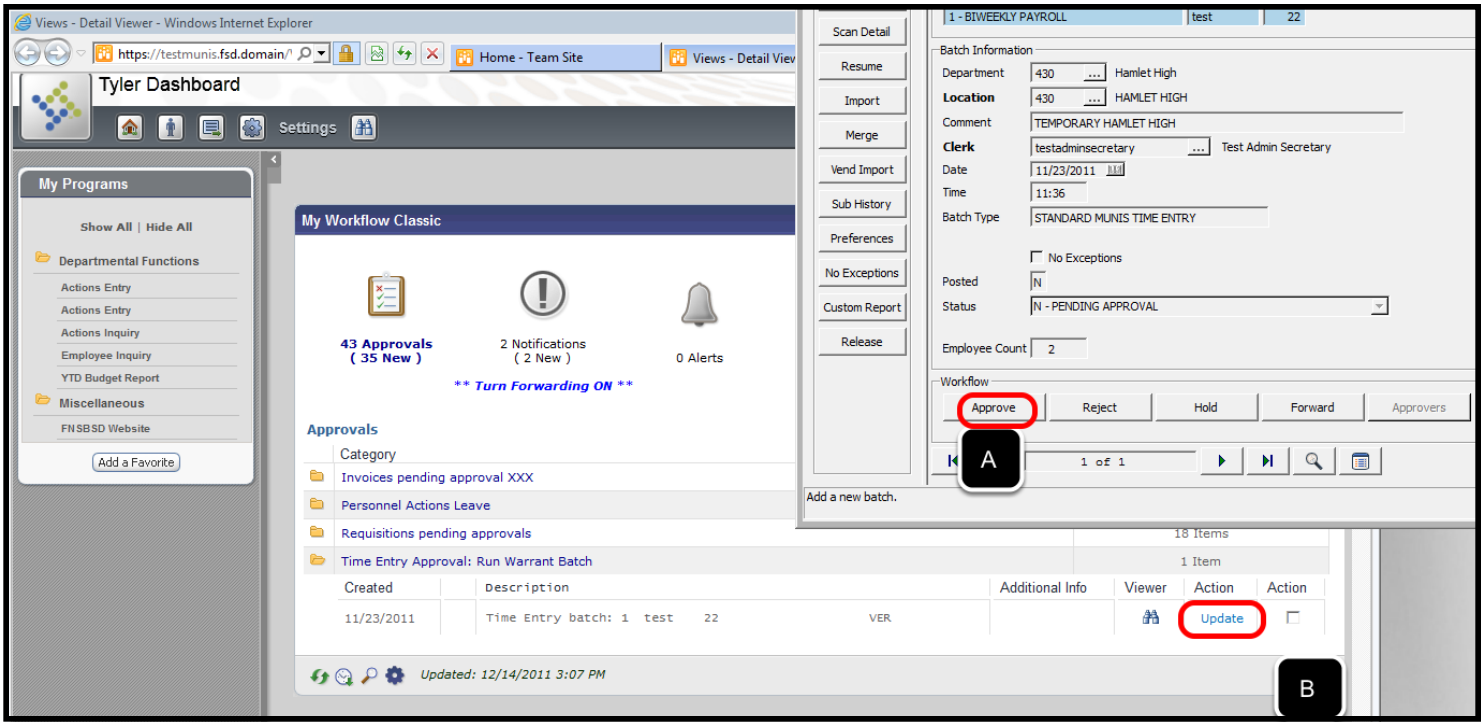
12/14/2011 14:31 | TEST DB Oct 25 2011 (Reloaded 11-07-11) | PG 1
testprincipal | BATCH REVIEW | prtimatt

RUN: 1 WARRANT: test PAYROLL START: 11/21/2011 PAYROLL END: 12/04/2011
USER: testadminsecretary LOC: 430 BATCH: 22 TEMPORARY HAMLET HIGH

NAME	PAY	PAY DESC	QUANTITY	ACCOUNT	FROM DT
COOPER, SHELDON L	127	BREAKAIDE 10	2.50	100-10-10-1255-320-13290 -0	11/21/11
COOPER, SHELDON L	127	BREAKAIDE 10	2.50	100-10-10-1255-320-13290 -0	11/22/11
COOPER, SHELDON L	127	BREAKAIDE 10	2.50	100-10-10-1255-320-13290 -0	11/23/11
COOPER, SHELDON L	127	BREAKAIDE 10	2.00	100-10-10-1255-320-13290 -0	11/28/11
COOPER, SHELDON L	127	BREAKAIDE 10	1.00	100-10-10-1255-320-13290 -0	11/29/11
COOPER, SHELDON L	127	BREAKAIDE 10	2.00	100-10-10-1255-320-13290 -0	11/30/11
COOPER, SHELDON L	127	BREAKAIDE 10	4.00	100-10-10-1255-320-13290 -0	12/01/11
COOPER, SHELDON L	127	BREAKAIDE 10	2.00	100-10-10-1255-320-13290 -0	12/02/11
TOTAL BY EMP 35			18.50 0.00 0.00		
MILLER, MEG	135	TEMPORARY 18	7.00	100-10-10-1010-320-13290 -0	11/21/11
MILLER, MEG	135	TEMPORARY 18	7.50	100-10-10-1010-320-13290 -0	11/22/11
TOTAL BY EMP 18622			14.50 0.00 0.00		
TOTAL			33.00 0.00 0.00		

** END OF REPORT - Generated by Test Principal **

Batch Approval

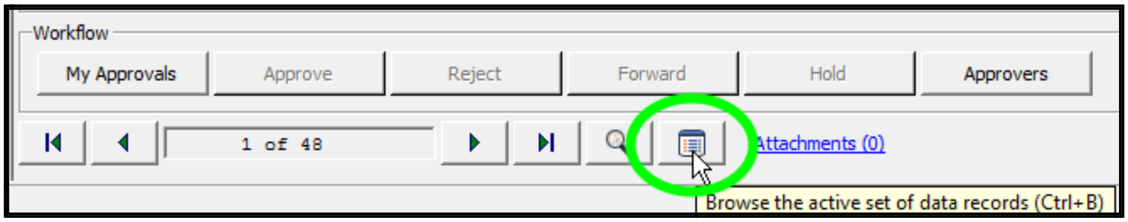


After reviewing the submitted time, you can choose to approve, reject, hold, or forward the payroll time entry batch.
Initiate the action from one of two places, either from the Workflow section of the Time Entry pop-up screen (A) or by clicking the Update link on your workflow approvals page (B).
There will be an opportunity to leave a brief comment, as applicable.

Purchasing

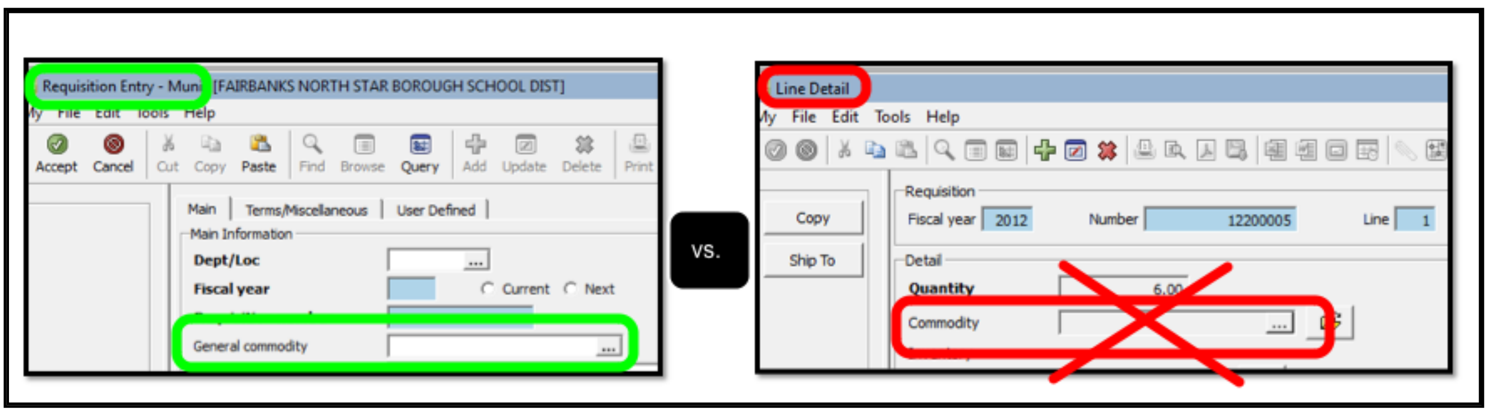
Purchasing - Some Definitions & Tips

List Your Req.s



How can you browse a list of all your purchase reqs?
To view all your purchase reqs, open the **Requisition Entry** screen.
Click on the **Find** button.
Enter your school/department code in the appropriate field and/or your f-number in the **Entered By** field.
Click the check mark ("Okay") button.
Browse the results by clicking on the **Browse** button located toward the bottom of the pane (circled in green in the image above).

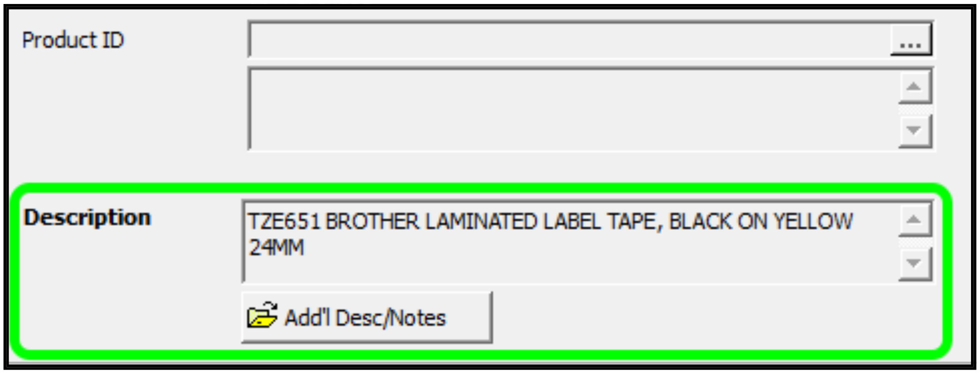
General Commodity vs. Commodity



Commodity
When you initiate a purchase requisition on the Requisition Entry screen, click on the ellipses and choose a **General Commodity** that best categorizes your entire requisition. This field is referenced on page 3 of the Purchasing Manual.

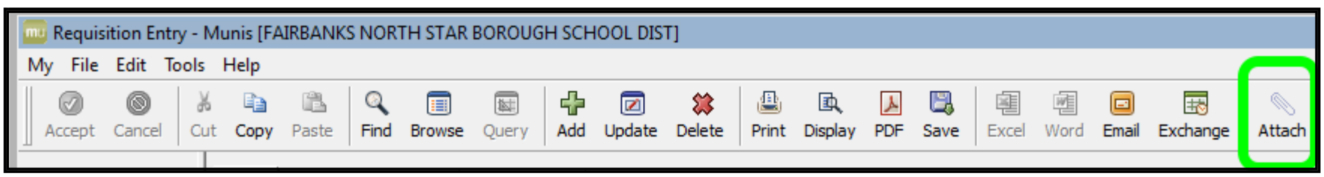
Do not choose a "Commodity" on the Line Detail screen. You might have seen a reference to this on page 8 of the Purchasing manual. Our organization does not use commodity codes on the line detail screen, so you can tab past this field.

Description - Line Detail Screen



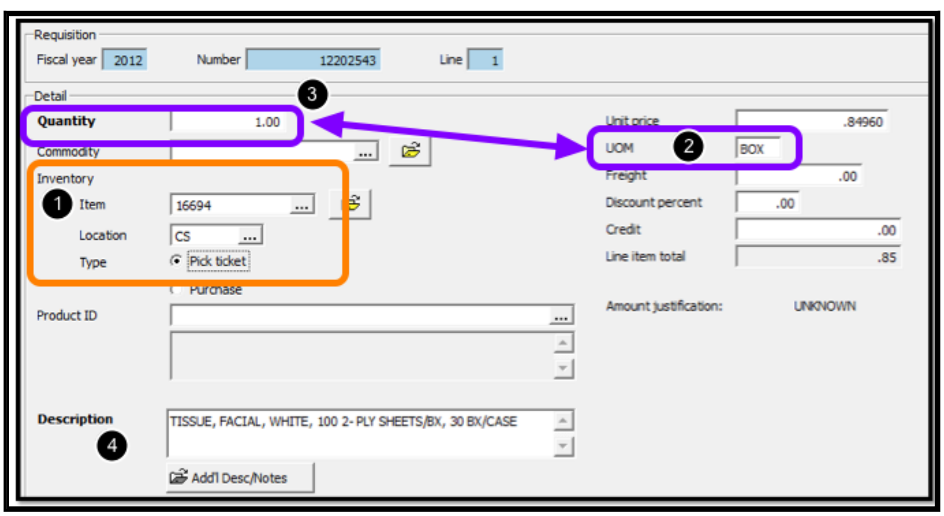
Description (in requisitions to Vendors):
If you have the item number that an outside vendor uses to identify the line item, put that number in the **Description** field.
Note: The description autofills for Central Stores items.

Attachments



If you have a quote from the vendor, attach it to the Requisition Entry.

Inventory Item Number and Inventory Location (Central Stores Orders Only)



1. The **Inventory Item** and **Inventory Location** fields on the Line Detail page will only be used if you are obtaining an item from Central Stores.

When you tab forward after filling in the Inventory Item Number, the Inventory Location fills in with "CS." **This refers to Central Stores, not the unit of measure.**

2. Please check your unit of measure (**UOM**), in the column to the right **AFTER** you tab forward from the Location field. In this example, the Unit of Measure for the item (facial tissues) displays as CASE when you insert the Inventory Item Number, but changes to BOX when you tab to the TYPE of Inventory Item.

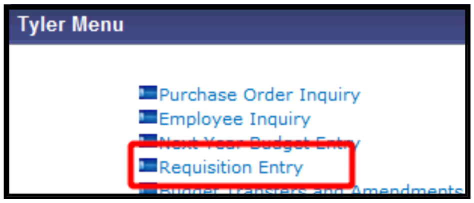
3. Once you have tabbed past the Inventory Location and verified the UOM, check your **Quantity** so that you will get the number of items you anticipate. In the case of facial tissues as shown above, this order would fill with one box of tissues. In order to get a CASE of tissues, the Quantity must be changed to 30 (as shown in the Description field).

4. The description autofills for Central Stores orders. In the case of an order to an outside vendor, please put the vendor's item number, if available, in this field.

Rejected Purchase Requisitions

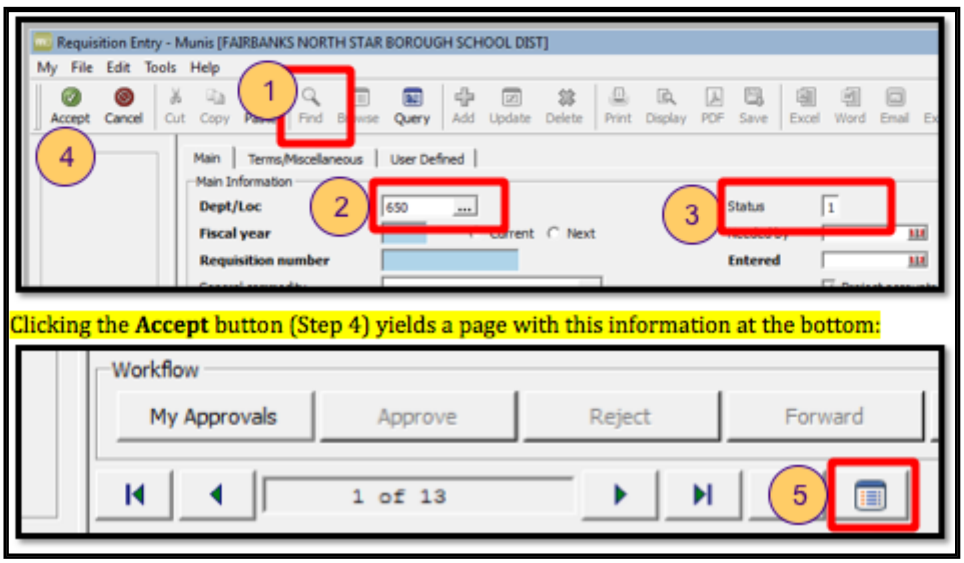
This lesson specifically refers to rejected purchase requistions, however, the same process could be used to find other categories of requisitions:
1 - Rejected; 2 - Created; 4 - Allocated; 6 - Released; 8 - Approved; 0 - Converted.

Requisition Entry



Start by opening the **Requisition Entry** page.

Example: Obtain a List of Rejected Requisitions



1. Click the **Find** button.
2. Enter your department/location (**Dept/Loc**) number.
3. Enter the number **1** (for Rejected) in the **Status** box. See the note in the introduction to this lesson for a list of all status codes.
4. Click the **Accept** button.
5. Click the **Browse** button on the resulting page to view a list of your department's requisitions.

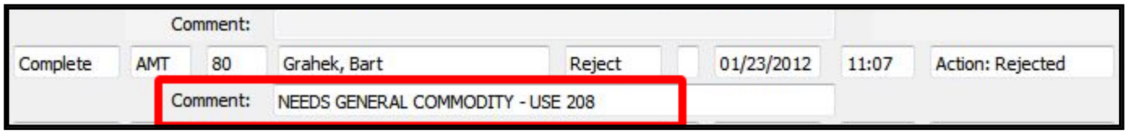
View the List

Double-click on the line of the rejected item you wish to inspect to open the record.

Find the issue

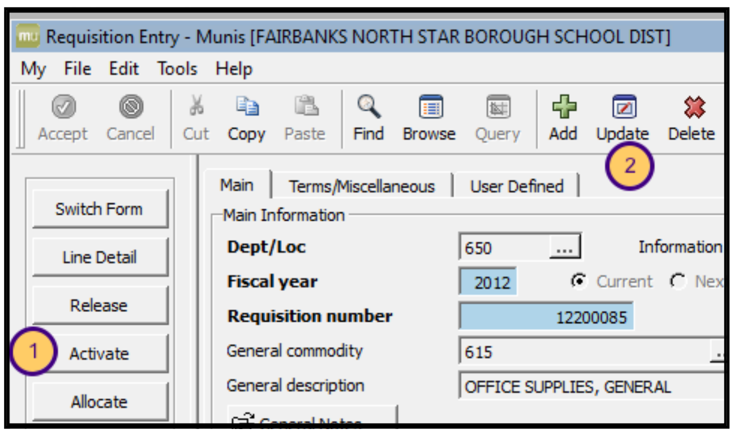
Click on the **Approvers** button to view the reason for rejection.

Read the Comment



The comment will explain how the purchase requisition was incomplete or incorrect.

Activate, Update, Revise and Release

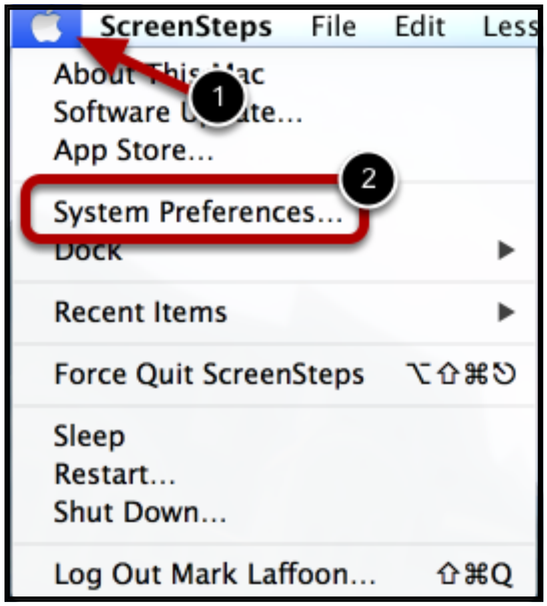


1. **Activate** the req.
2. Click the **Update** button.
3. Revise or correct the requisition as per the comment.
4. Release the requisition.

Tips & Tricks

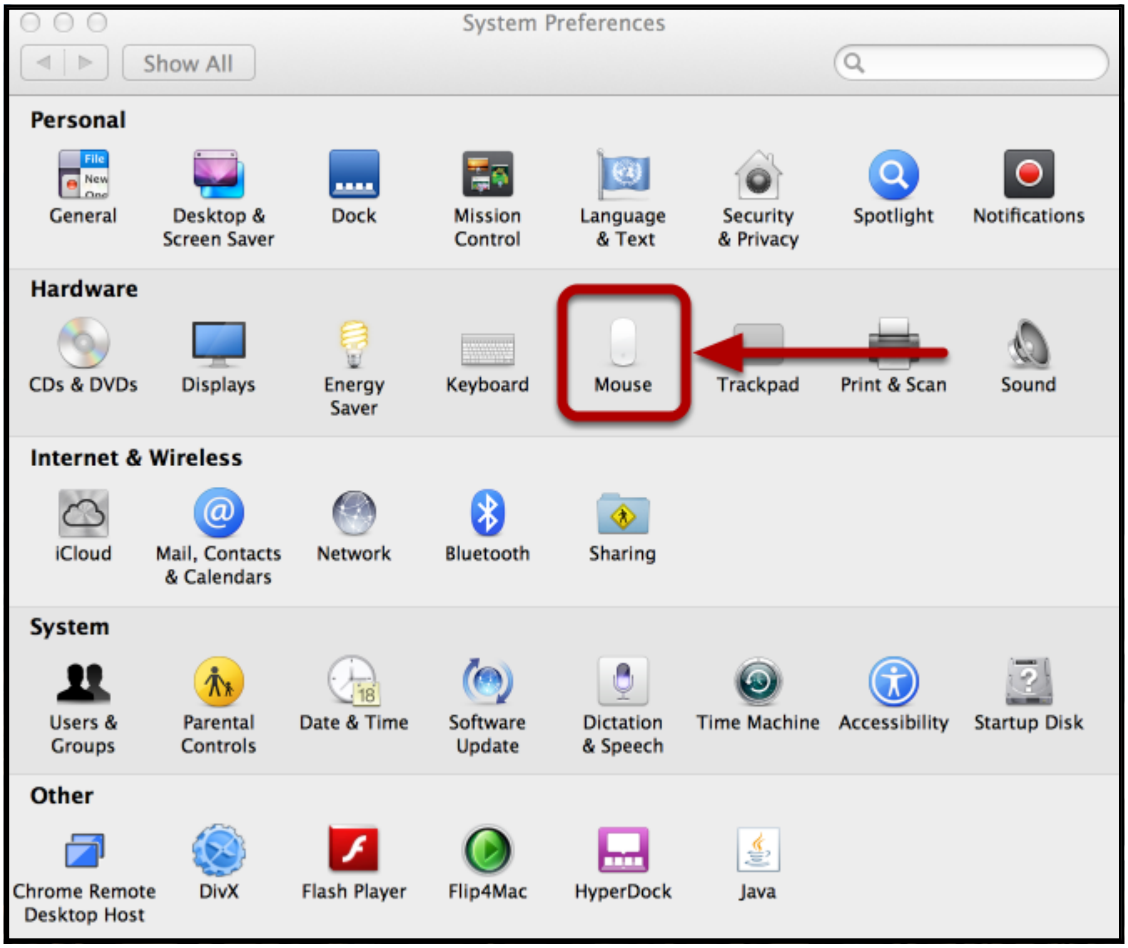
Enable right click on a Mac

Open System Preferences



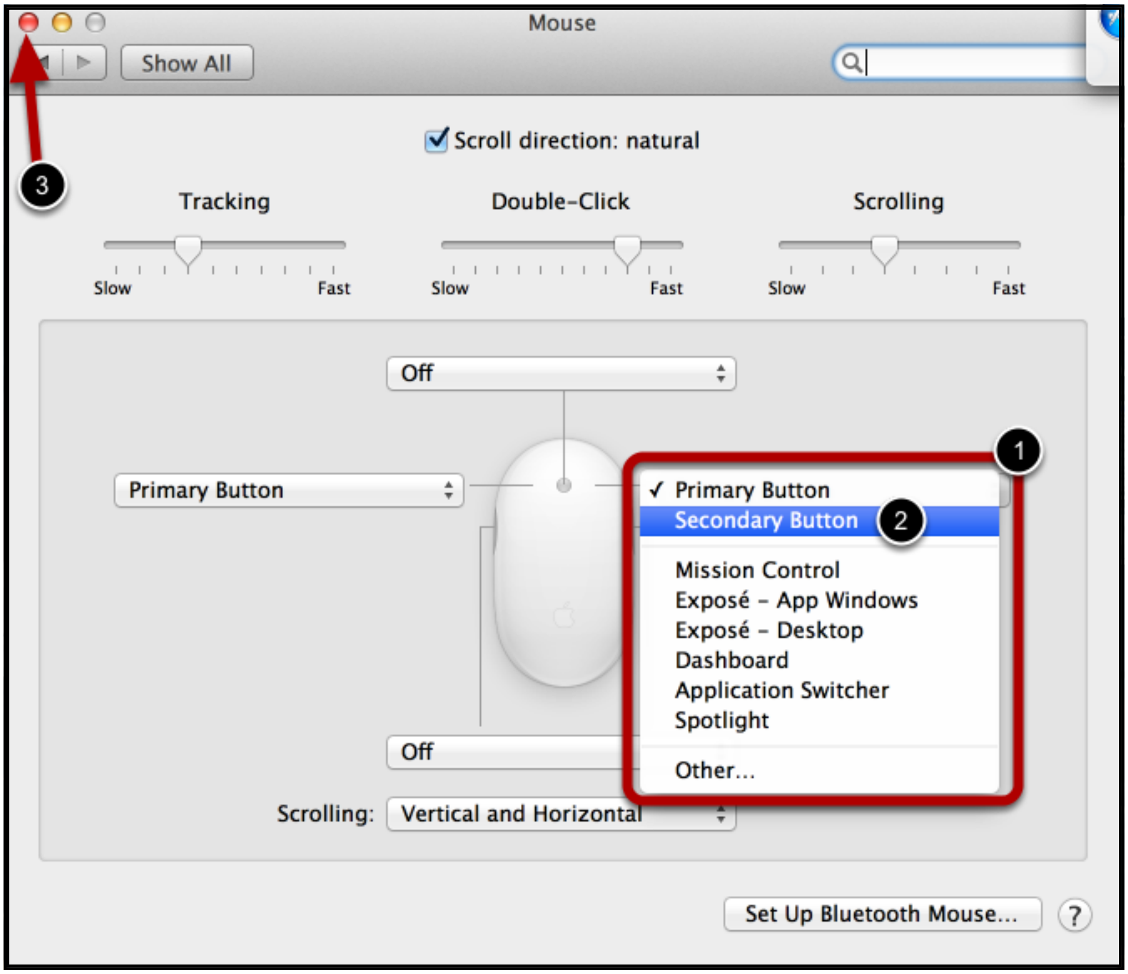
1. Click the Apple Icon in the top left of the screen
2. Clcik on System Preferences

Enter "Mouse" settings



Click the Mouse icon

Changing the Mouse Settings



1. Select the dropdown menu on the right
2. Click "Secondary Button"
3. Close the window

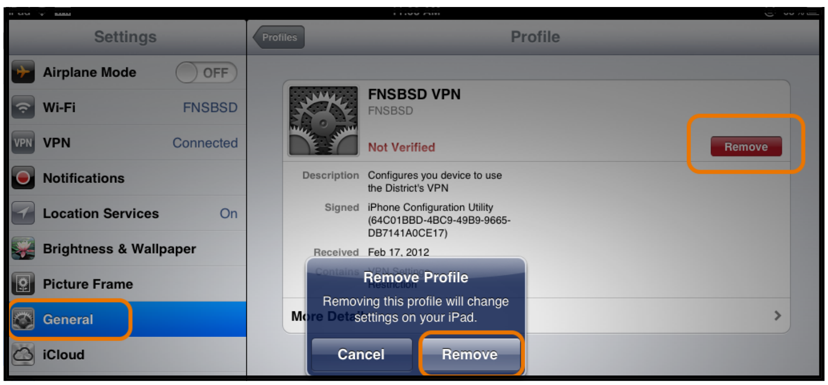
iDevice: Configuring Access to the Virtual Private Network

Building administrators and certain other managers have Virtual Private Network (VPN) accounts that allow connection to the terminal server that hosts Munis when located outside the reach of the district's network. Accessing munis via VPN is somewhat different when using an iDevice versus a desktop or laptop computer.

Our Network Administrator advocates using the free iDevice app called Cisco AnyConnect for access using an iDevice when traveling outside the reach of the district's network.

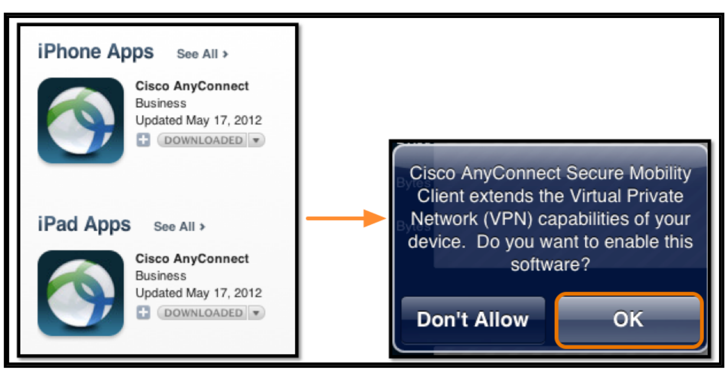
For use of the District's VPN on a laptop or desktop computer, please refer to the tutorial entitled **Using VPN to Access Munis (Computer).**

Remove the Previous VPN Profile



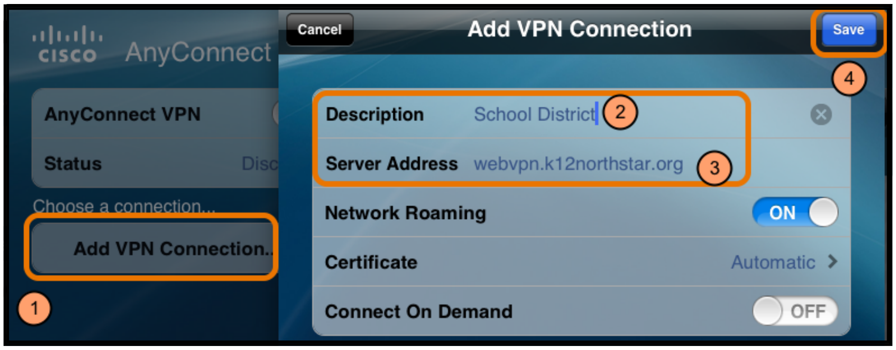
If you had previously downloaded the VPN profile emailed to you by the Network Administrator, first take a moment to remove that profile.
Go to your iDevice's **Settings > General.** Scroll to the bottom and tap on **Profile.** Tap on the **FNSBSD VPN Profile.** Select **Remove.**

Visit the App Store



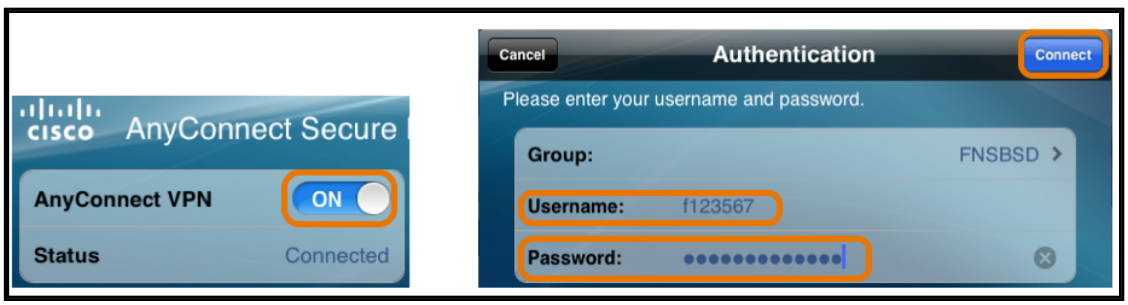
Search the App Store for Cisco AnyConnect.
Download the version appropriate for your iDevice. Open the app and enable the software.

Add VPN Connection



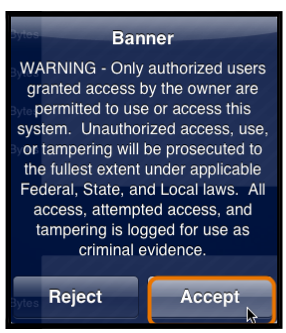
1. Tap on **Add VPN Connection.**
2. Give the connection a **Description** (name).
3. Enter this **Server Address: webvpn.k12northstar.org**
4. Leave the default values for the rest of the pop-up; tap **Save**.

Make the VPN Connection



Slide the AnyConnect VPN to **ON**. Enter your f-number and password, then tap on **Connect**.

Authorized Use Banner



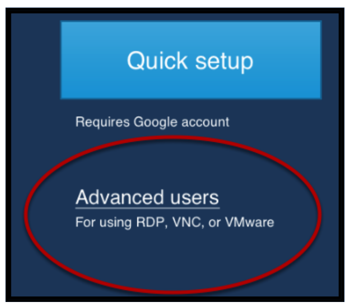
Once you have accepted the pop-up, you're ready to open PocketCloud and access Munis.
If you haven't already configured Pocket Cloud, view the tutorial entitled **iDevice: Using PocketCloud to Access Munis.**

iDevice: Remote Desktop App -- Configuring PocketCloud

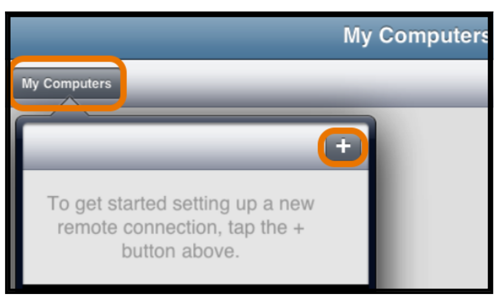
Downloading PocketCloud Remote Desktop App gives you the ability to access Munis from an iPhone or iPad.
Building and district administrators may also access the district's Virtual Private Network (VPN) when **outside the FNSBSD network**. See the tutorial entitled **iDevice: Configuring Access to the Virtual Private Network** for instructions on how to get access.
Only building and district administrators will be given VPN access to the district's network.

Visit the App Store

In your search bar type **PocketCloud**. Select the FREE version and download.

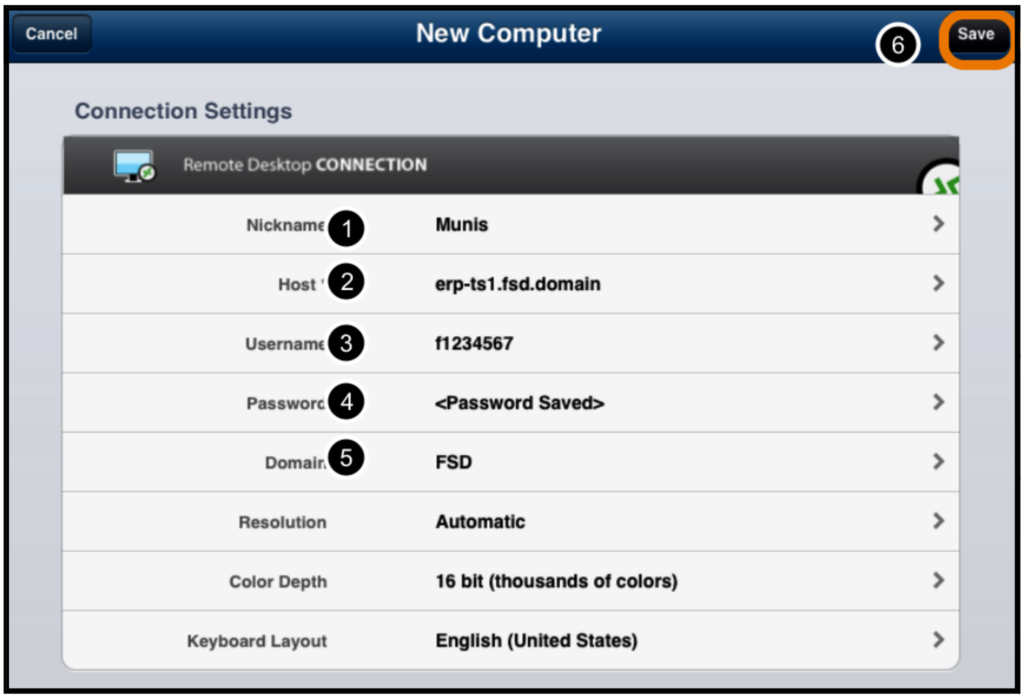


Open the app and select **Advanced users**.
If prompted to send anonymous usage statistics, select **NO**.



Depending on what operating system you are using, you might get directly to the "connection type" (see below) or might need to take these steps
1. Tap on **My Computers**
2. Tap on the plus symbol **+**

Select **Manual Connection** and then **RDP.**



Complete the settings as follows:
1. Munis
2. erp-ts1.fsd.domain
3. your "f" number
4. your password
5. FSD
6. SAVE your settings

Instructions for using PocketCloud are located in the tutorial **iDevice: Using PocketCloud to Access Munis**.

iDevice: Using PocketCloud to Access Munis

If you have not already followed the instructions in the tutorial entitled **iDevice: Remote Desktop App -- Configuring PocketCloud**, please do so prior to utilizing this tutorial. All tutorials can be found on the district Website.

Real Network or Virtual Network?

This step is not necessary for users who are within range of the district's network.

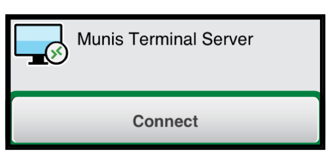
Administrators who are physically outside the reach of the district's network must first access the network using a Virtual Private Network (VPN) app. If you haven't already downloaded and configured Cicso AnyConnect on your iDevice, please refer to the tutorial entitled **iDevice: Configuring Access to the Virtual Private Network**. Only building and district administrators have VPN accounts.

Once configured, locate and open your Cisco AnyConnect app, turn the VPN **ON**, and initiate access to the VPN using your f-number and password.

PocketCloud

Click on the **Home** button on your iDevice to return to the normal view. Find your **PocketCloud** app and open it.

Connect to the Terminal Server

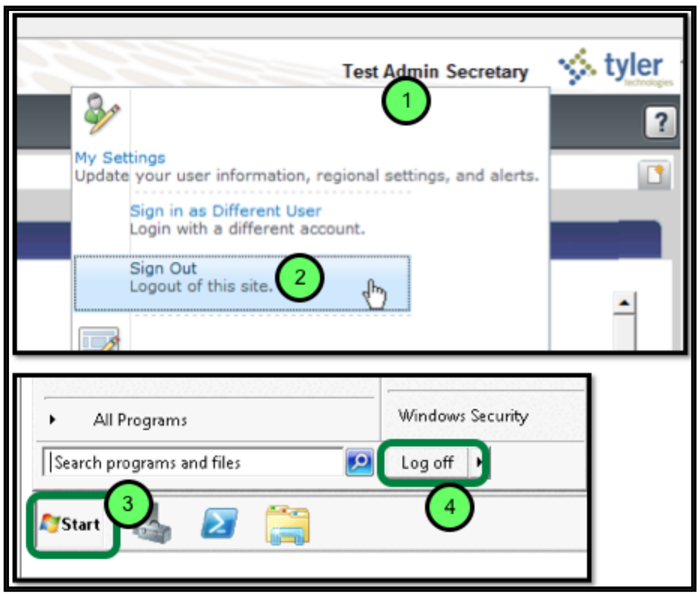


Click on the **Connect** button to enter the terminal server environment.

Double-Click On the Internet Explorer Icon

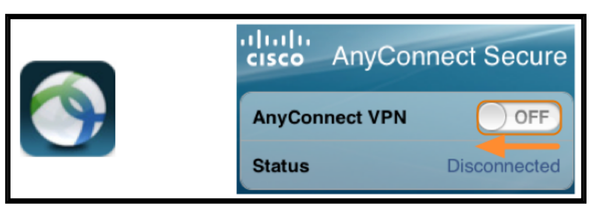
From this point, your Munis experience will be very much like a session initiated on your desktop or laptop computer.
The screen desktop background is probably black.
One of our users recommends an iPad or iPhone stylus (like a pen with a soft tip) for clicking on buttons and other targets in this smaller setting.

Ending your VPN-Enabled Munis Session



At the end of your session, as always, please remember to
Sign Out of Munis (steps 1 & 2) and **Log off** the terminal server environment (see steps 3 & 4).

Turn VPN Off



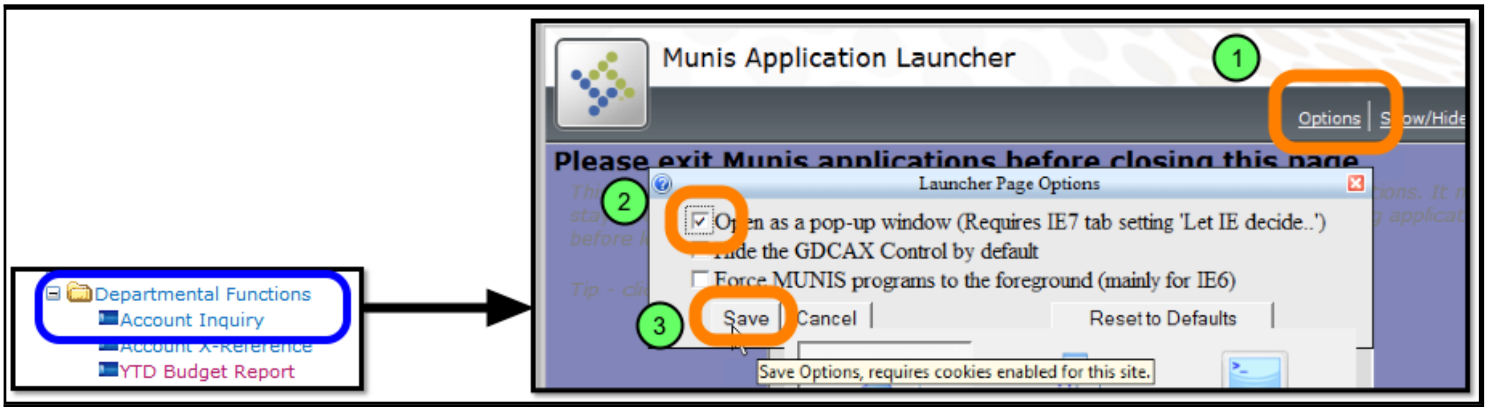
1. Return to Cisco AnyConnect.
2. Turn OFF the VPN.

The Munis Application Launcher

After logging in to Munis, the first time you click on an application link (for example, "Actions Entry") another tab opens in your browser and you will be moved from the Munis home page to this new tab, known as the Munis Application Launcher.

This tutorial describes two aspects of the Munis Application Launcher:
1. How to configure the Munis Application Launcher page to automatically move to the background of your browser session; and,
2. How the Munis Application Launcher can help when you encounter an error in a Munis application.

Configuration Options



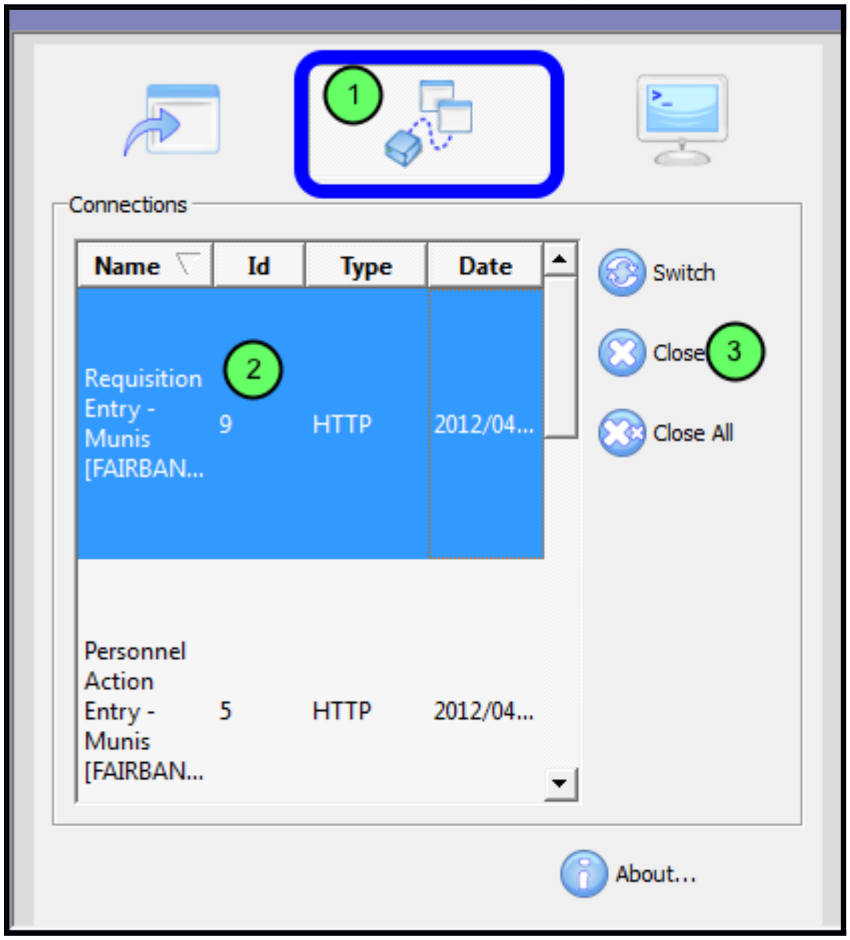
Here's how to make the Munis Application Launcher appear as a pop-up and automatically move to the background of your browser session (you will only have to do this reconfiguration once).

First, sign into Munis. Then follow these steps:
Open the **Departmental Functions** folder;
Click on any link, e.g., Account Inquiry.

Your Internet Explorer page will change from the Tyler Home page to the Munis Application Launcher. On the Munis Application Launcher page:
1. Click on the **Options** link.
2. **Check** the first box to open as a pop-up window.
3. **Save** this change.

Next time you start a Munis session and click on an application link, the Munis Application Launcher will pop up and move to the background. Your browser session will remain on the Munis Home page.

Using the Munis Application Launcher



The Application Launcher can be used as a sort of "force quit" for Munis pages that are not responding. Follow these steps for a demonstration of how to use it:

First, sign into Munis. Then follow these steps:
Open the **Departmental Functions** folder;
Click on any link, e.g., Requisition Entry. Wait for the page to appear, then minimize it (don't close it).

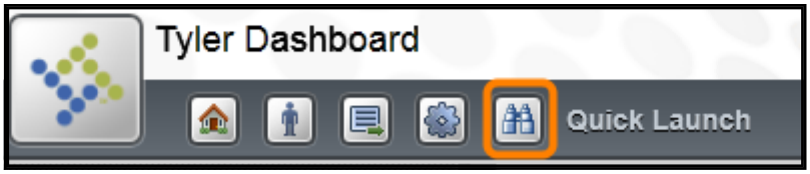
Go to the Munis Application Launcher tab or pop-up:
1. Click on the middle icon (Connections);
2. Click on the block of information that relates to the "frozen" page; then,
3. Click on the Close button.

You may choose to close a single application or all applications.

Quick Launch

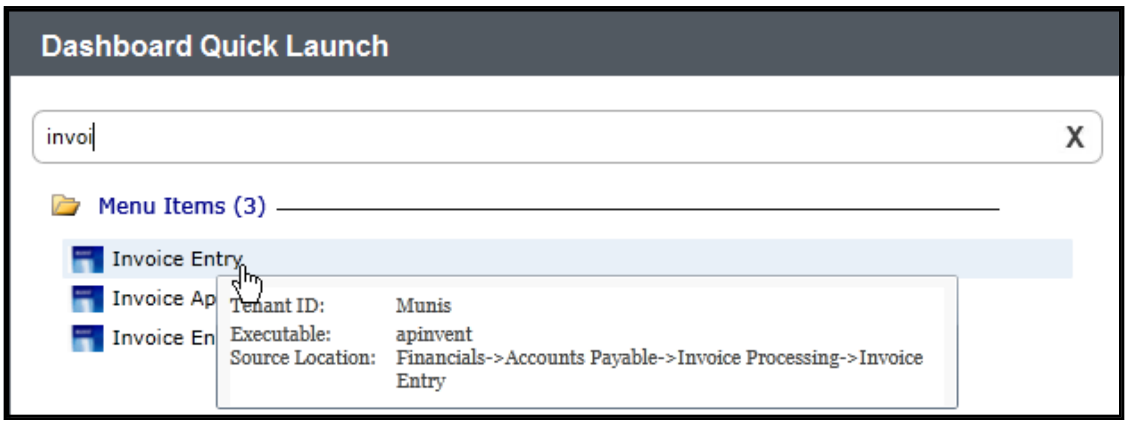
Here's a shortcut for finding an application without going through the menu tree.

Quick Launch



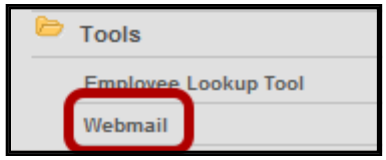
Click on the binoculars to initiate the Quick Launch pop-up.

Type In the Search Field

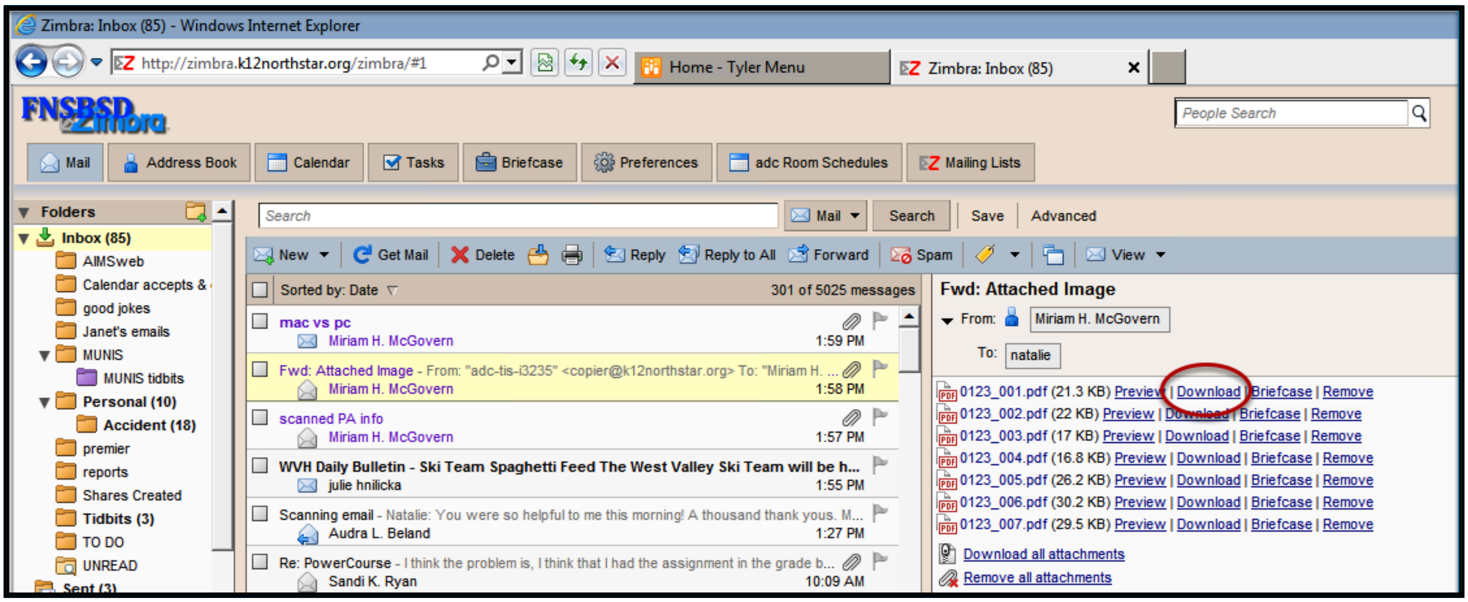


Click your cursor in the search field, then begin typing the name of the application.
A list of menu items containing the characters you've entered will display.
Note that if you hover over the name of an application, you can see where the page is located on the menu tree (Source Location).
Click *once* on the name of the desired menu item to launch it.
Close the **Dashboard Quick Launch** by clicking on the **X** at the far right of the search field.

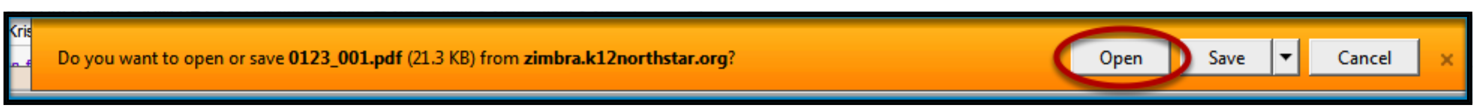
Saving Scanned PDF's



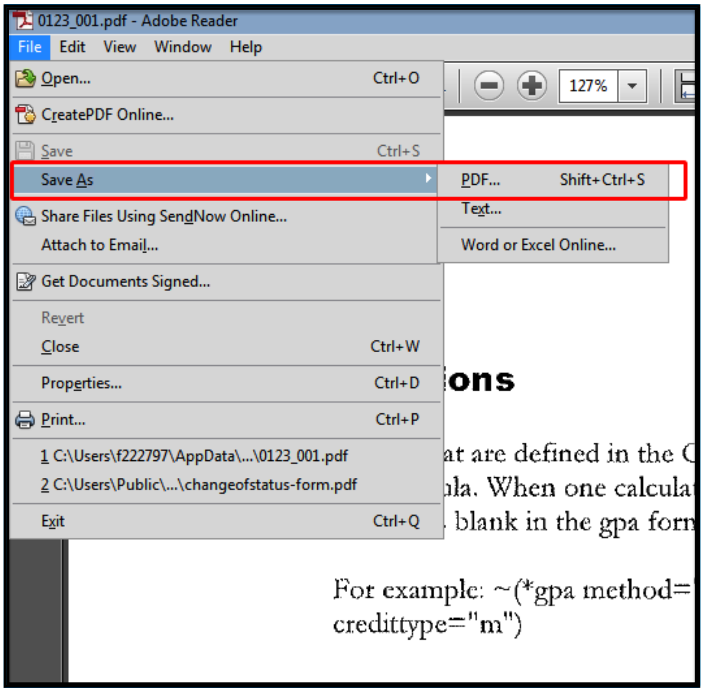
1. While in Munis, click on your Webmail favorite to open your email. If you do not have this Web favorite, please obtain the tutorial from the Munis Training Material page at the district website. Alternatively, open your webmail in a new tab with the url http://webmail.k12northstar.org in order to access your email.



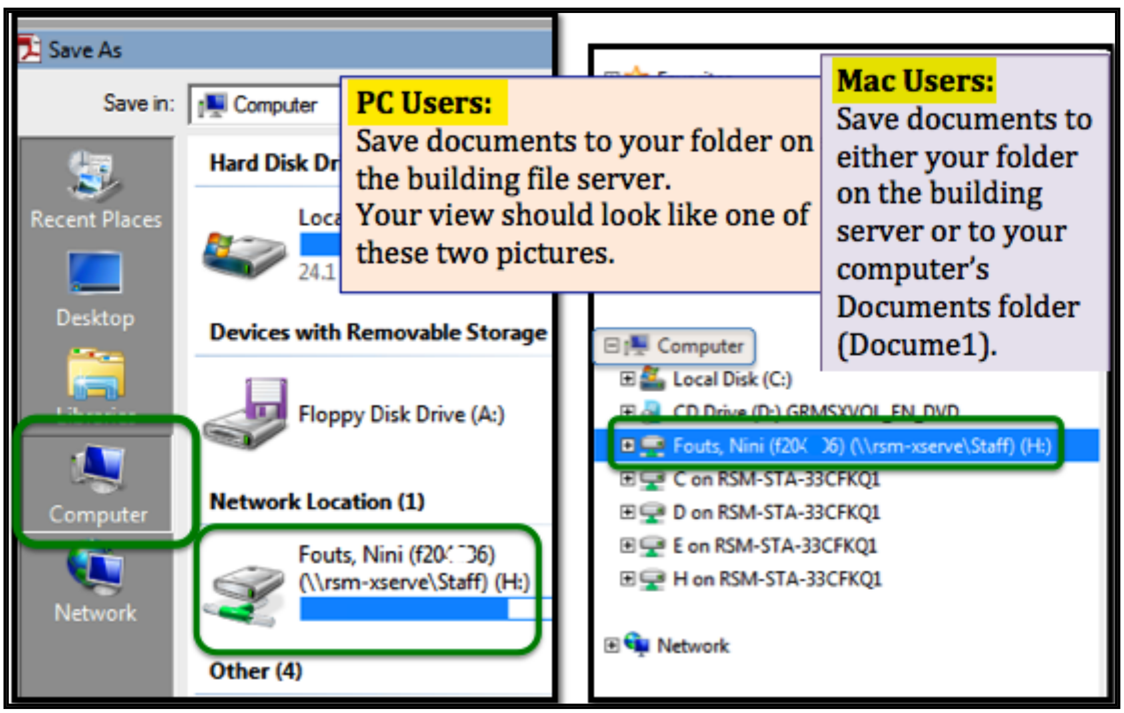
2. Click on "download" for the PDF you would like to access.



3. Select "Open" to view your document.



4. Select "File"> "Save As"> "PDF." Give it a meaningful name to locate easily when attaching it. See next step to find the location to save it to.

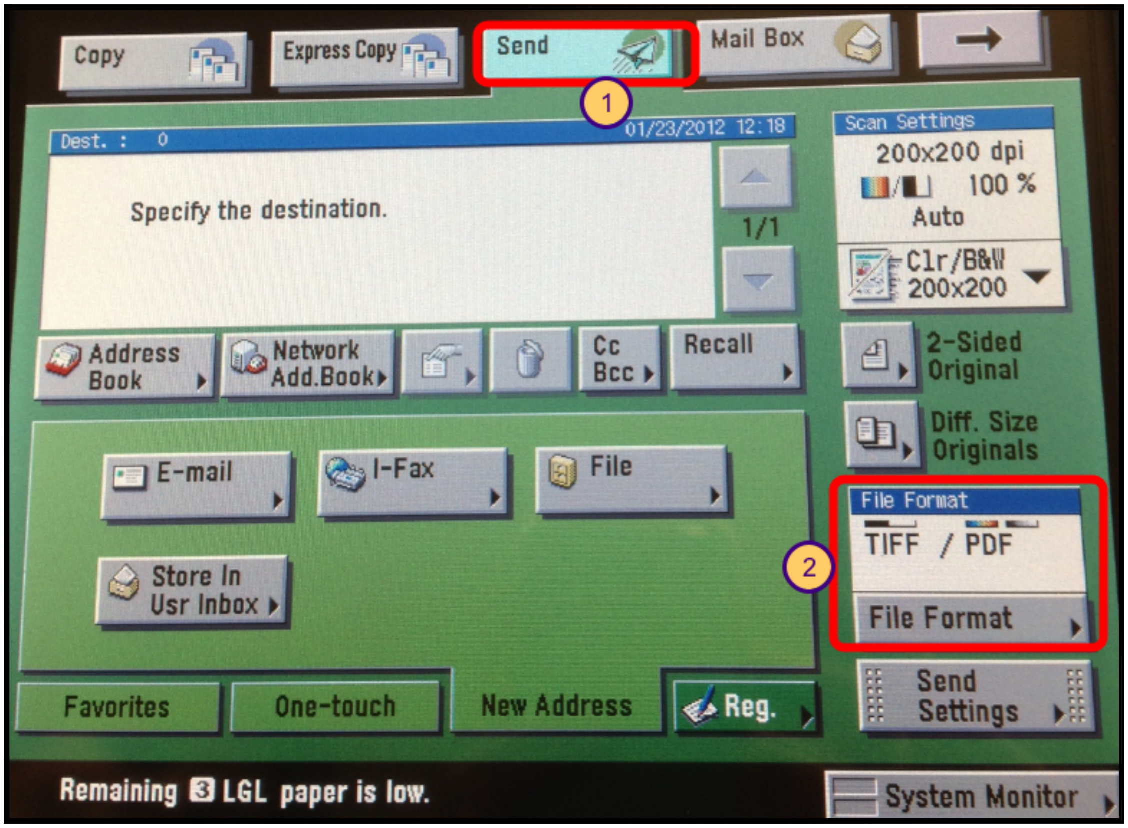


5. Save your documents as shown above for your operating system (PC or Mac).

Scanning Documents for Use in Munis

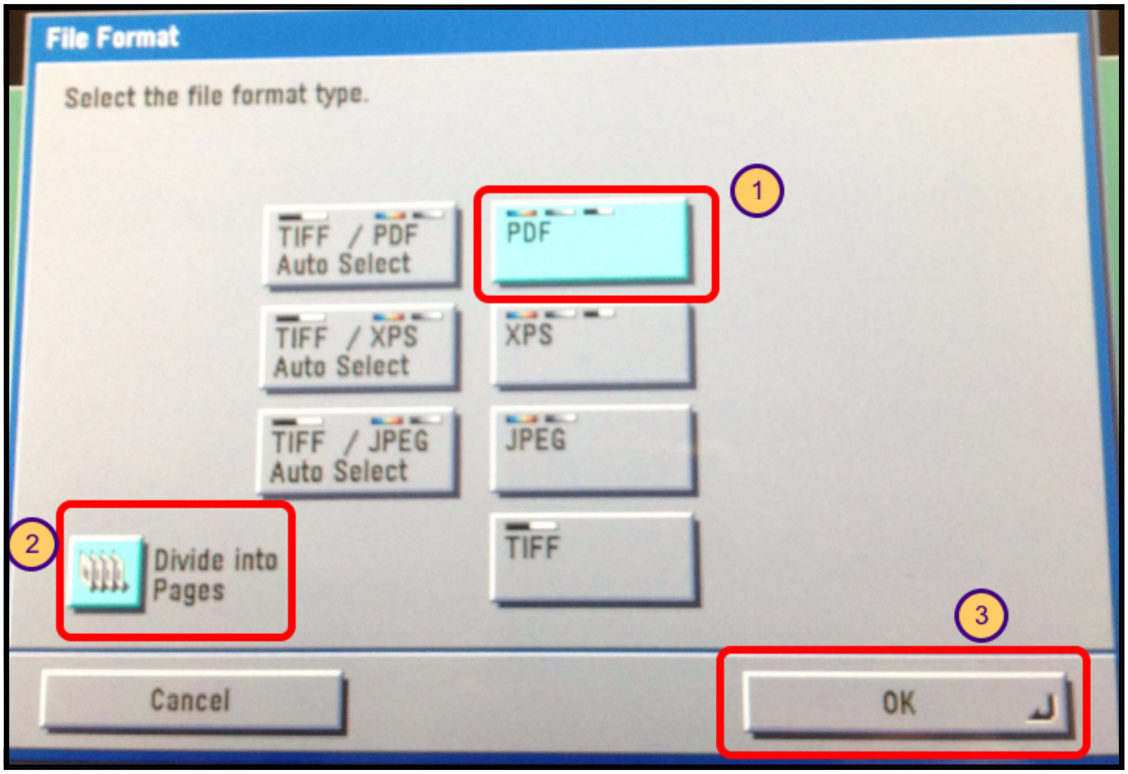
If the copier/scanner/printer at your office or school is a Canon ImageRunner 3235, use the shortcut in this document to scan in multi-page documents that will be attached as single pages to Munis records. The Canon ImageRunner 6065 offers the same functionality, but the images in this document will differ whereas the steps will not.

Scan the document page(s) to yourself.



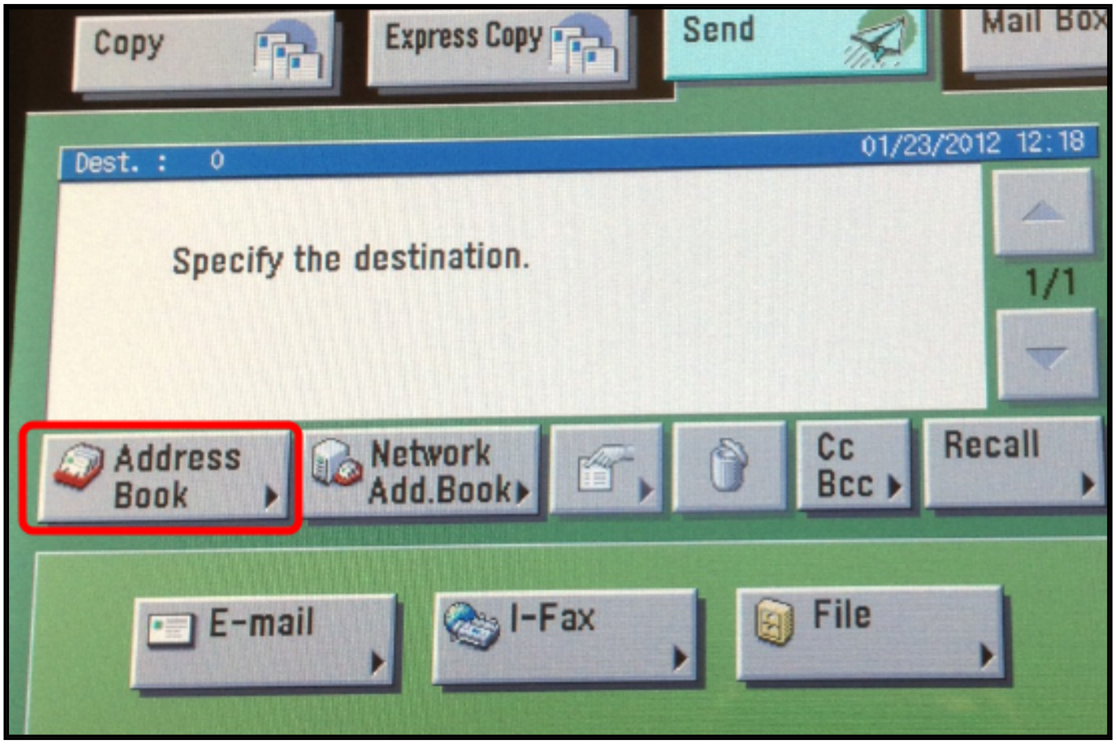
1. Tap on the **Send** tab.
2. Tap on the **File Format** button.

File Format Options



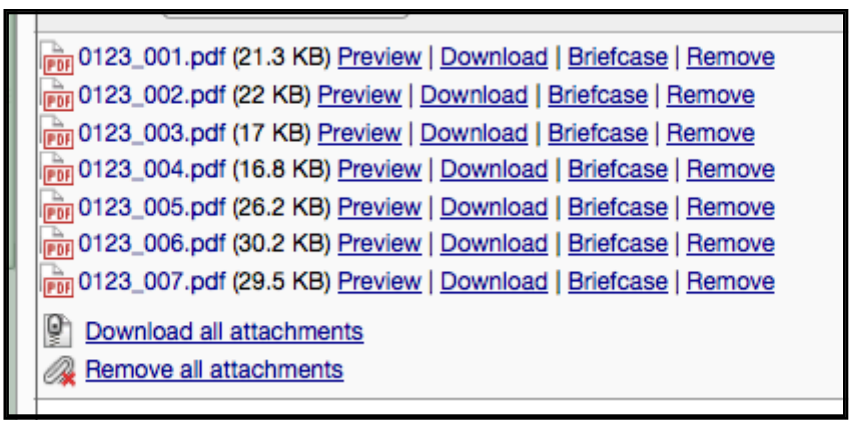
1. Choose **PDF**.
2. Tap on **Divide into Pages** if your document has multiple pages but you will be attaching individual pages from it to your Munis record.
3. Tap on OK.

Choose the Destination



Either find your email address in the **Address Book** or tap on **E-mail** and enter your address manually.

Check Your Email While in the Terminal Server



Your multi-page document has been sent to you in individual pages in the pdf format. The scanned pages will arrive in one or more emails.
Next step -- check out the tutorial called **Saving Scanned PDFs**

Using AnyConnect to Access Munis Outside the District (PC)

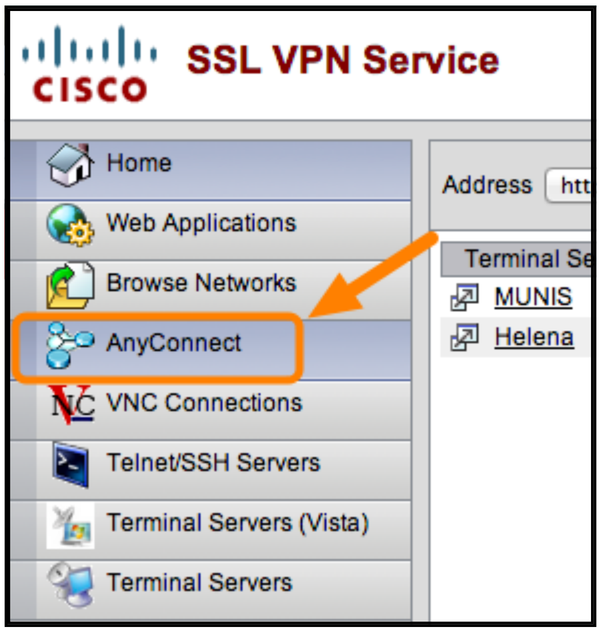
Administrators can access Munis when away from the district's network without using java.

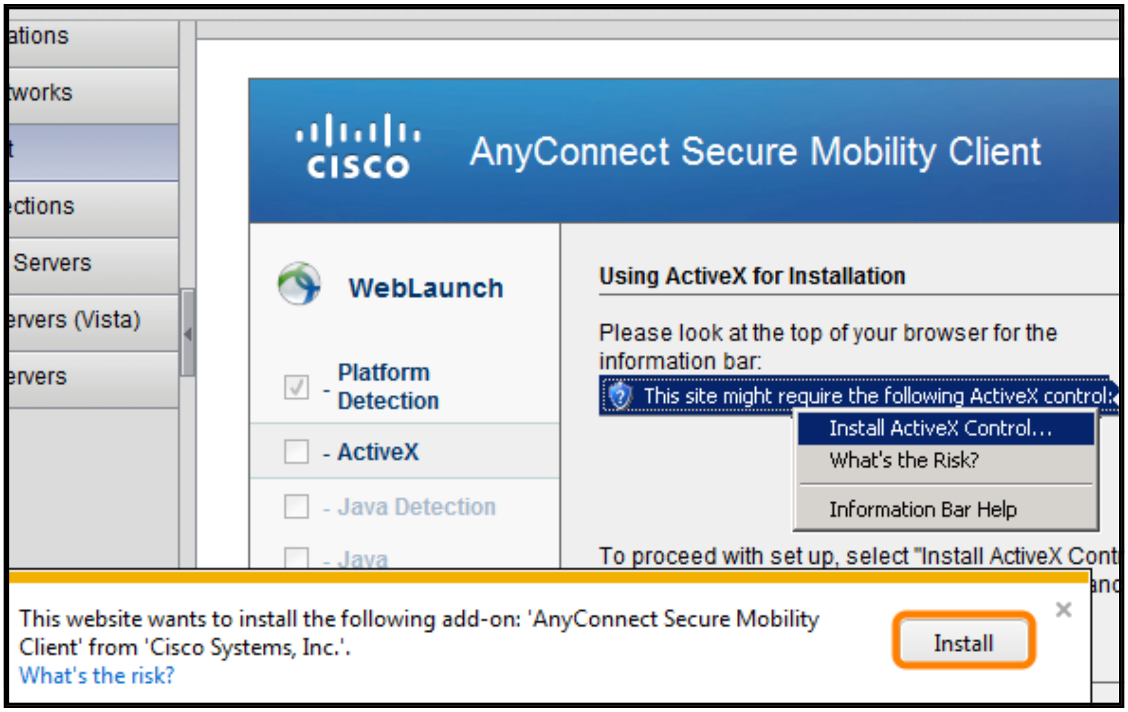
Download Cisco AnyConnect onto your computer

You will only need to download and install AnyConnect once.

Navigate to https://webvpn.k12northstar.org and log in using your f-number and password.

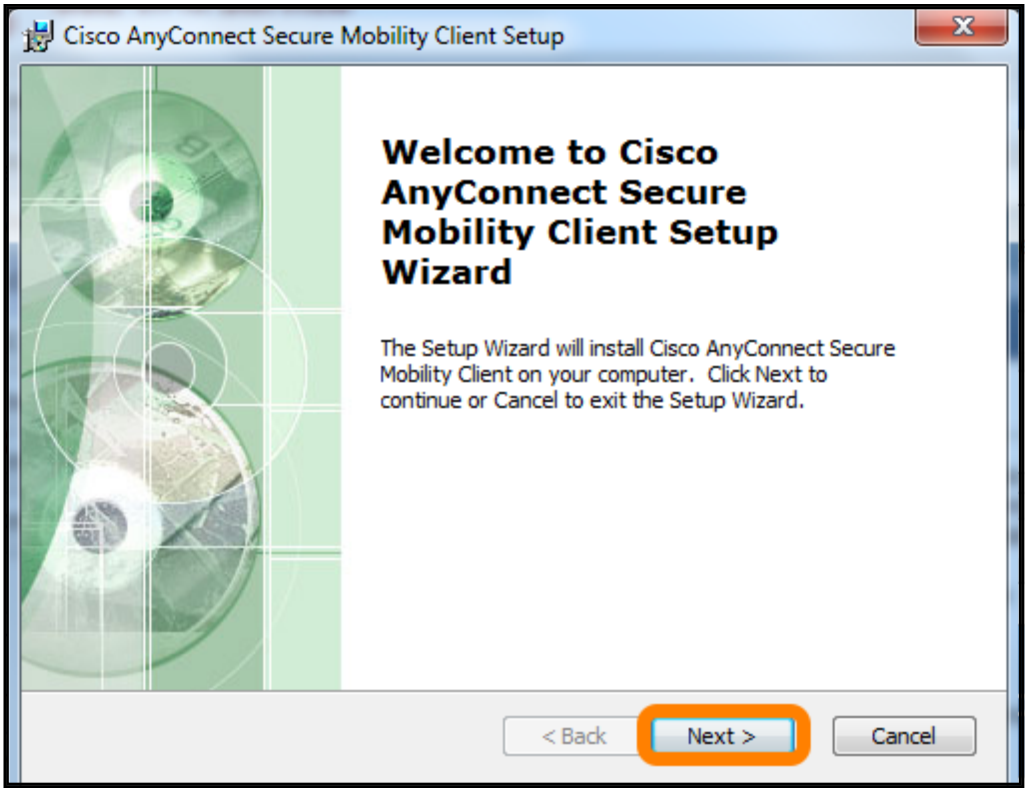
Instead of clicking on the Munis link in the Terminal Server Bookmarks area, click on AnyConnect:



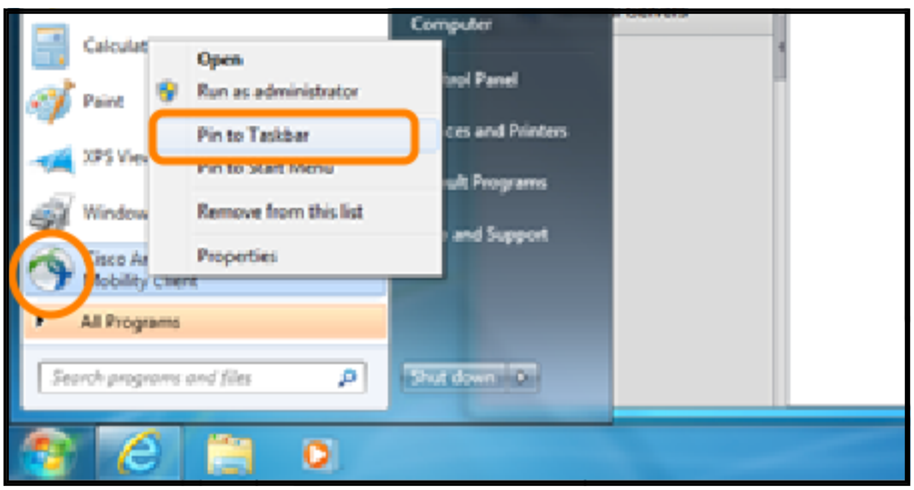


Have patience while the program attempts to install automatically. The automatic installation almost never works, so click on the link as shown below:

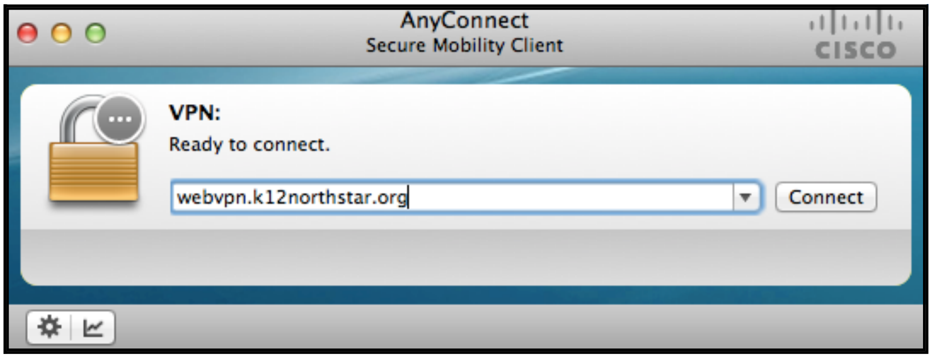
Follow the steps outlined in the Setup Wizard:



Click on the Home button and locate the AnyConnect icon. Right-click on the icon and pin it to the task bar for future use.



Click on the AnyConnect icon on your task bar. Enter the vpn web address and click "Connect":



You will need to enter your f-number and/or password to complete the connection to your VPN account.
Once the VPN link is established, use IE to navigate to munis.fsd.domain.
Be sure to disconnect from (Quit) your VPN session when finished. Otherwise, all of your browsing will continue to run through the district's network.

Using AnyConnect to Access Munis Outside the District (Mac)

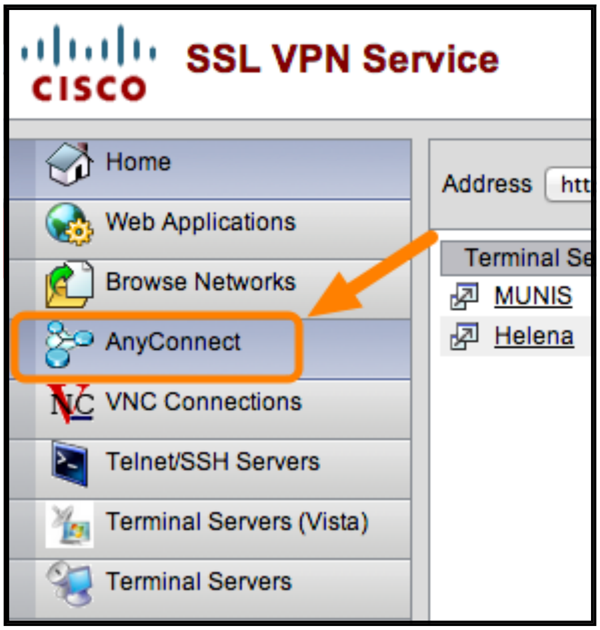
Administrators can access Munis when away from the district's network without using java.

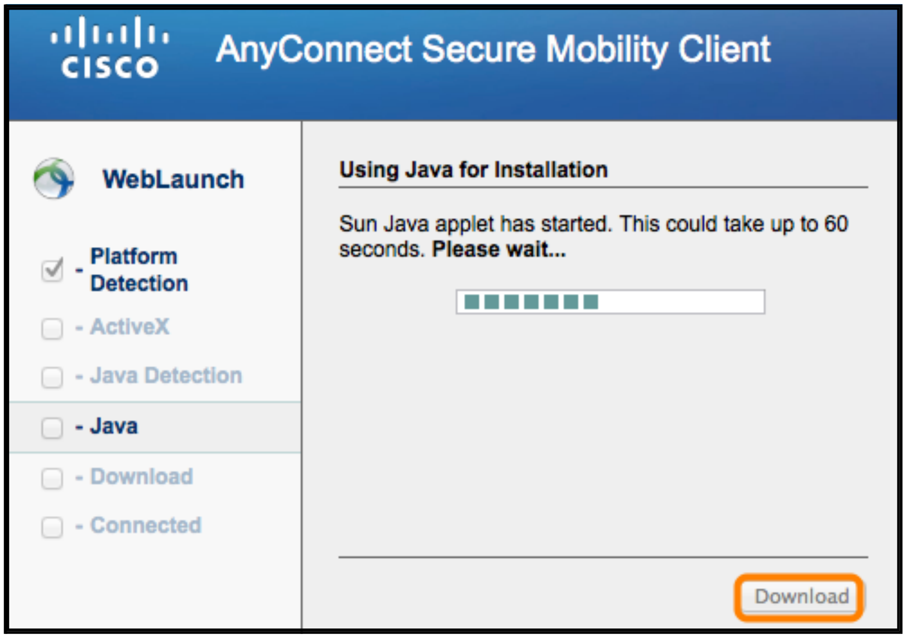
Download Cisco AnyConnect onto your computer

You will only need to download and install AnyConnect once.

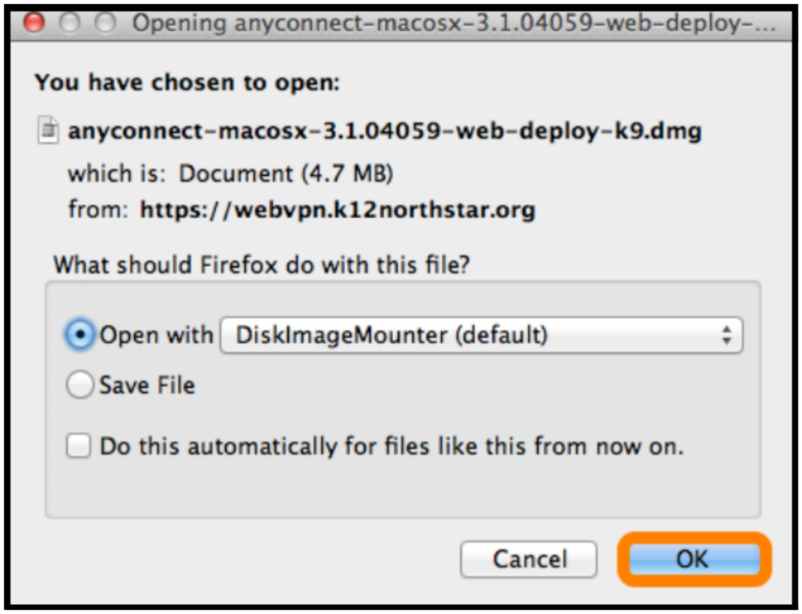
Navigate to https://webvpn.k12northstar.org and log in using your f-number and password.

Instead of clicking on the Munis link in the Terminal Server Bookmarks area, click on AnyConnect:



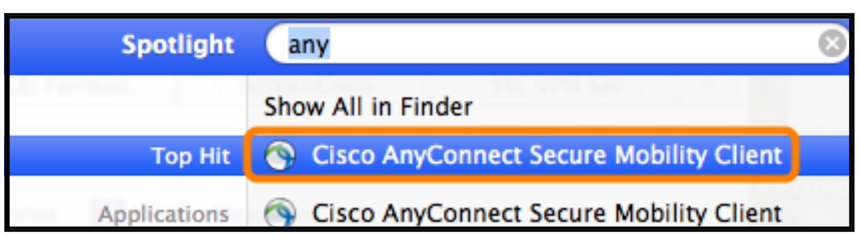


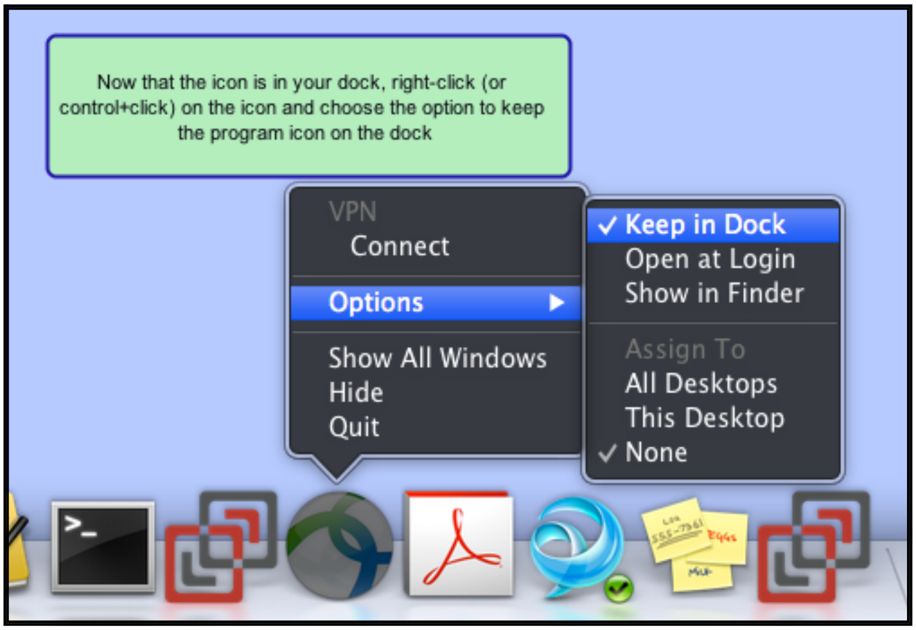
Have patience while the program attempts to install automatically. The automatic installation almost never works, so click on the link as shown below:



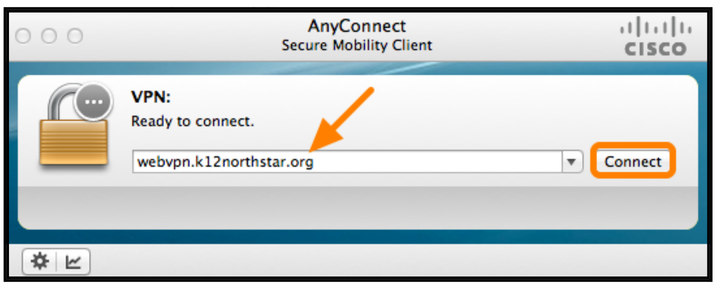
Double-click on the VPN package:

You can use the spotlight ("magnifying glass" icon in upper right corner of your computer desktop) to search dor the AnyConnect application. Click on it to open.



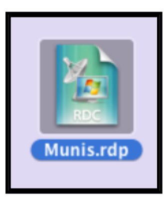


To use the Cisco VPN, enter **webvpn.k12northstar.org** in the connection field and click **Connect**.



You will need to enter your f-number and/or password to complete the connection to the VPN session.

Once connected, you can double-click on the remote desktop icon to access Munis just as you would when you're on the district network.



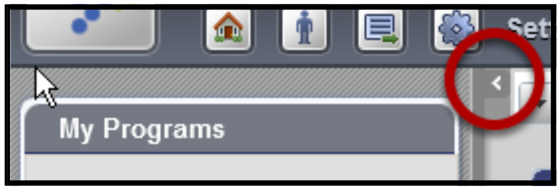
Be sure to disconnect from (Quit) your VPN session when finished. Otherwise, all of your browsing will continue to run through the district's network.

Web Favorites

My Programs

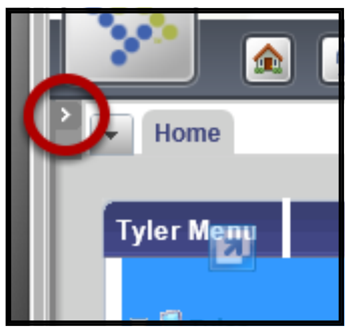
My Programs allows you to add and remove Favorites. Favorites provide quick access to the MUNIS Menu and user entered websites. You can also hide the My Programs to see more of the Main Screen.

Hiding My Programs



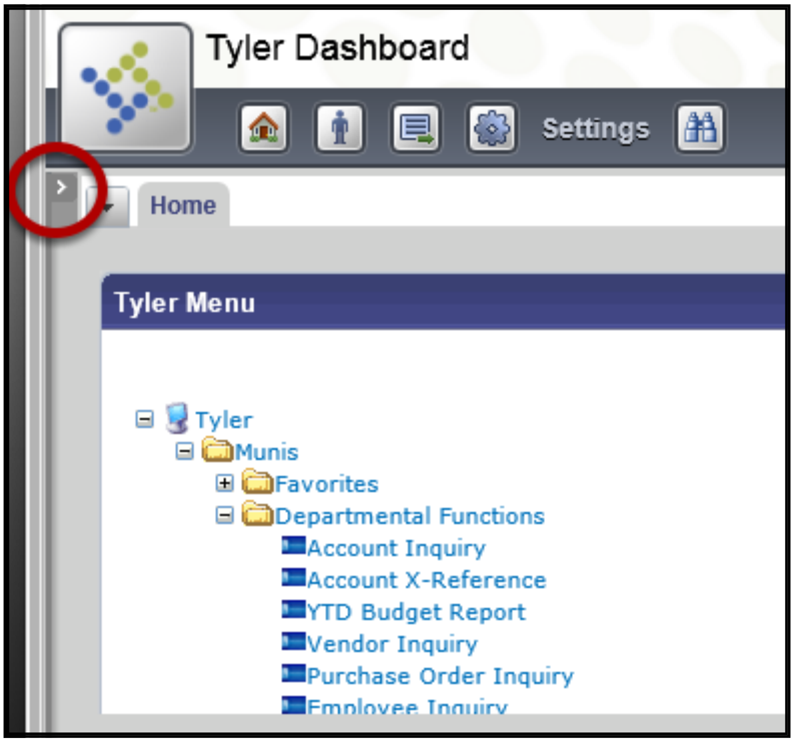
To hide the Navigation Menu, click on the **Left Arrow** at the top of the Navigation Menu.

Displaying My Programs



To display the Navigation Menu, click the **Right Arrow** on the left of the screen.

Add a MUNIS Menu Program to My Programs



STEPS:

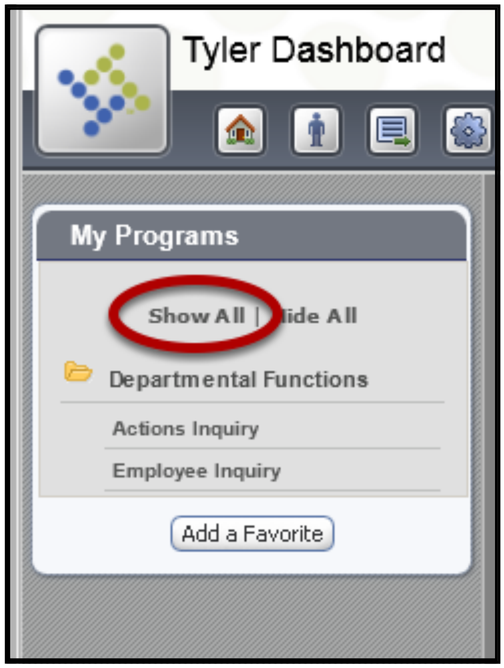
1. Make sure that the My Favorites web part is closed; else, the favorite will appear there. See the Closing Web Parts section in this document for more information.

2. On the MUNIS Menu, navigate to the desired program.

3. Right-click on the program.

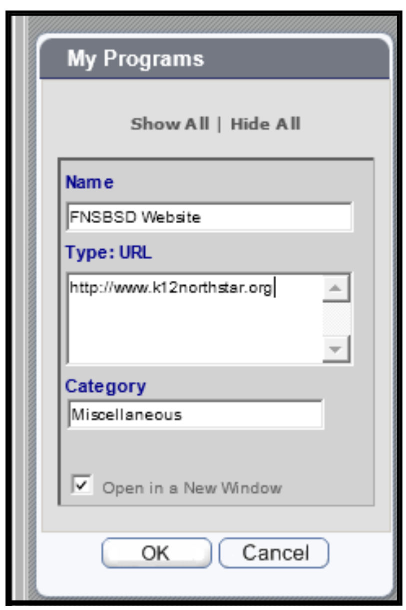
4. Click the **OK** button.

Viewing My Programs



The Module and the selected program will now appear in you're my Programs list. Note: If the added program is the first to be added under the MUNIS Module, then the Module name is automatically added to the favorites list. All programs are listed in alphabetical order under the Module, not in the MUNIS Menu order.

Add a Website to My Programs



1. At the bottom of the Navigation Menu, click the **Add A Favorite** button.

2. In the **Name** field, enter the name that you want to appear in the My Programs list.

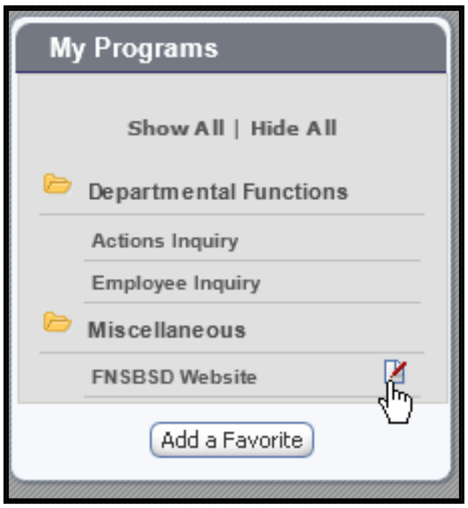
3. In the **URL** field, enter the URL to the website, be sure to include the HTTP:// .

4. In the **Category** field, enter a category or choose from the list. Note: Users can create personalized categories by typing a category name. Once the category has been added, it can be chosen from the list.

5. Check **Open in a New Window** to have the website open in its own window.

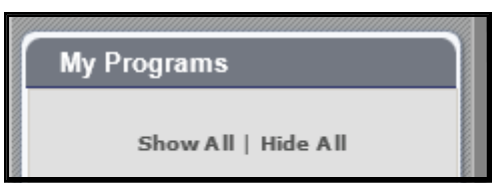
6. Click the **OK** button. The website will appear in your Favorite list.

Edit or Delete a Favorite



To edit or delete a favorite, on the Navigation Menu, click on the **Edit** button next to the favorite that you want to edit or delete.
Edit the favorite as needed or click on the **Delete this Favorite** button at the bottom of the menu to delete from your favorites. Once deleted, the favorite will no longer be available in your favorites list.

Expand and Collapse the Favorites Menu



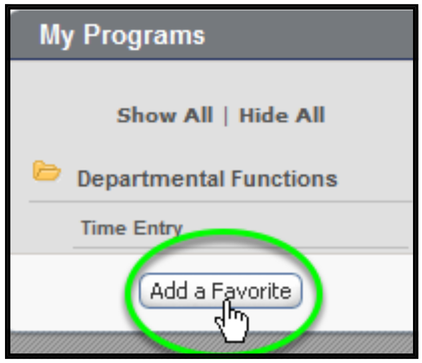
To quickly expand the Favorites Menu, click **Show All** on the Navigation Menu.

To quickly collapse the Favorites Menu or the Views Menu, click **Hide All** on the Navigation Menu.

Club Accounts

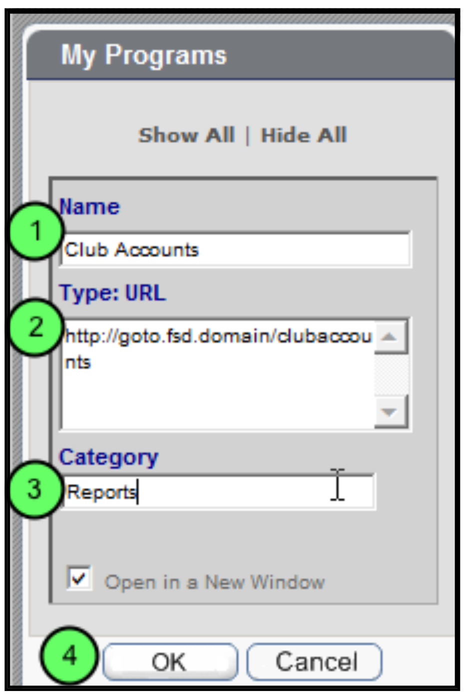
This tutorial guides you through the process of adding a "favorite" to render a report showing your club account balances.

Add a Favorite



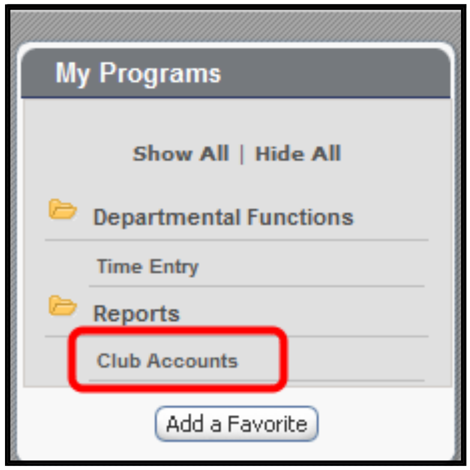
Click on the **Add a Favorite** button to add the link to the club accounts report to your list of favorite programs.

Define the Favorite



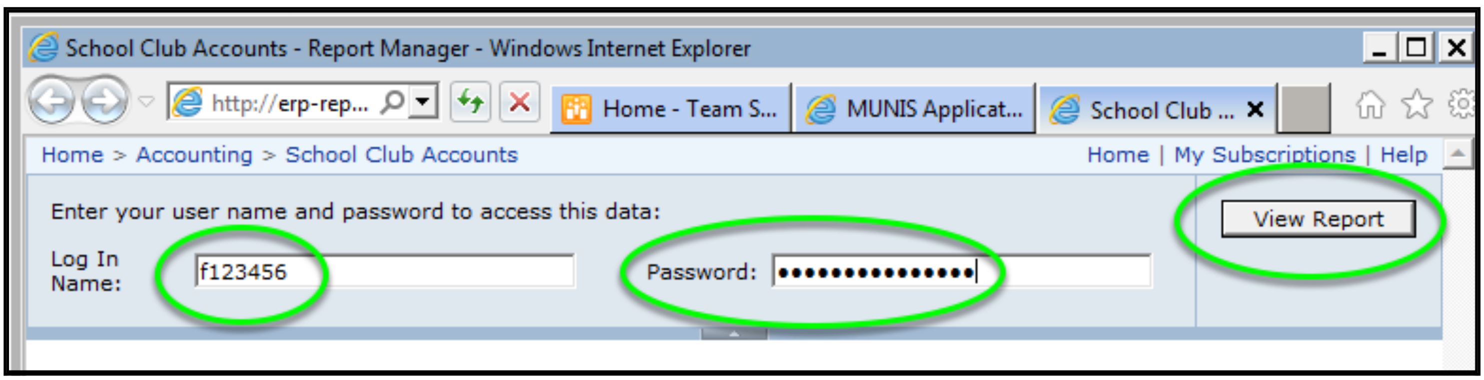
1. Give the link a name (e.g., **Club Accounts**).
2. Enter the url as follows -- **http://goto.fsd.domain/clubaccounts**
3. Create a category to hold this report, if you wish (e.g., **Reports**).
4. Click the **OK** button.

Go to the Link



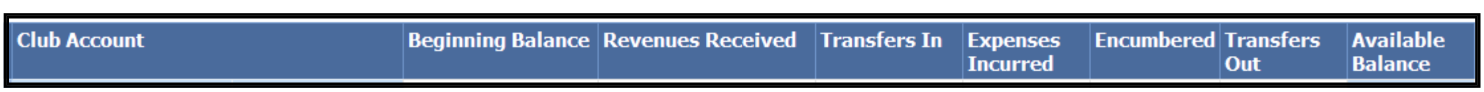
Click on **Club Accounts.**

Enter Your f-number and Password



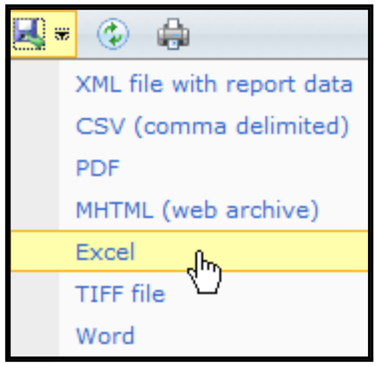
Enter your f-number and password, then click **View Report.**
The resulting report will show all your club accounts and their respective

View the Report



The report offers the information shown above.

Using Excel

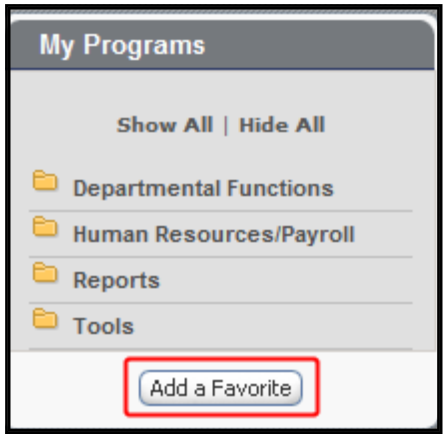


You can export the data into an Excel spreadsheet in order to manipulate the data and formatting.

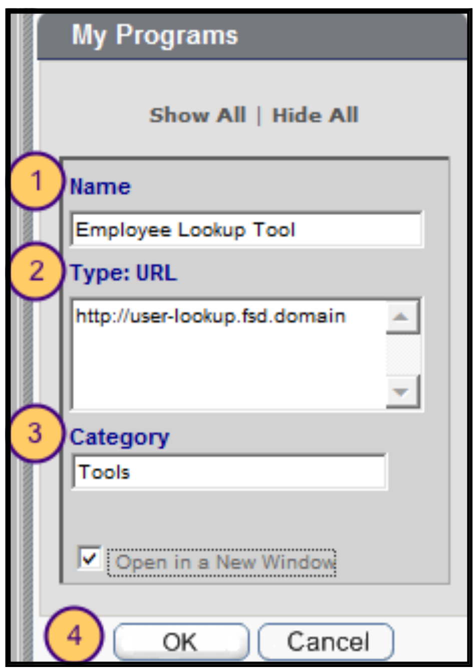
Employee Lookup Favorite

Here is a simple tool for finding an employee using several letters of their name or a few numbers of their f-number.

Add a Favorite

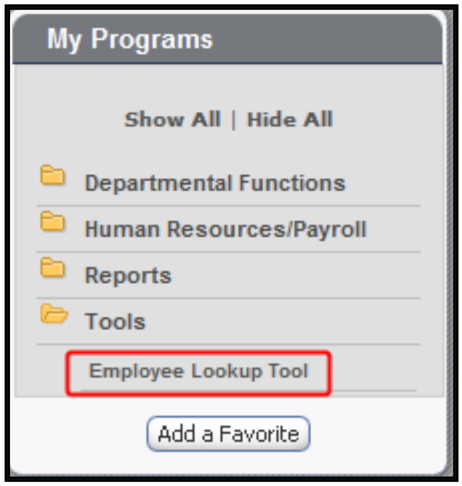


Define the Favorite



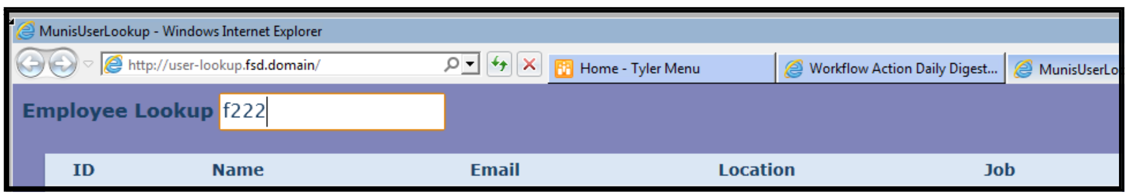
1. Enter a name for the favorite.
2. Enter the url as follows -- http://user-lookup.fsd.domain
3. Choose a category underwhich to file this favorite, or create a new one.
4. Click OK.

Test out your new tool.



Click on the Favorite you just added.

Start your search.

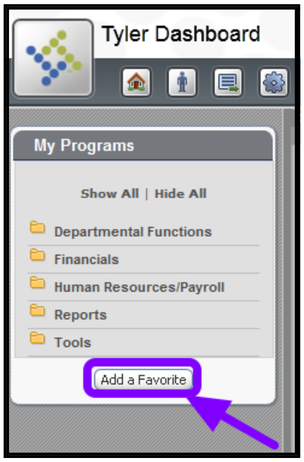


Type in any part of the person's name or f-number. All names or numbers containing the string you entered will appear in the list, accompanied by the information indicated in the column headings. Return to your Munis session by clicking on the **Home - Tyler Menu** tab.

Webmail Favorite

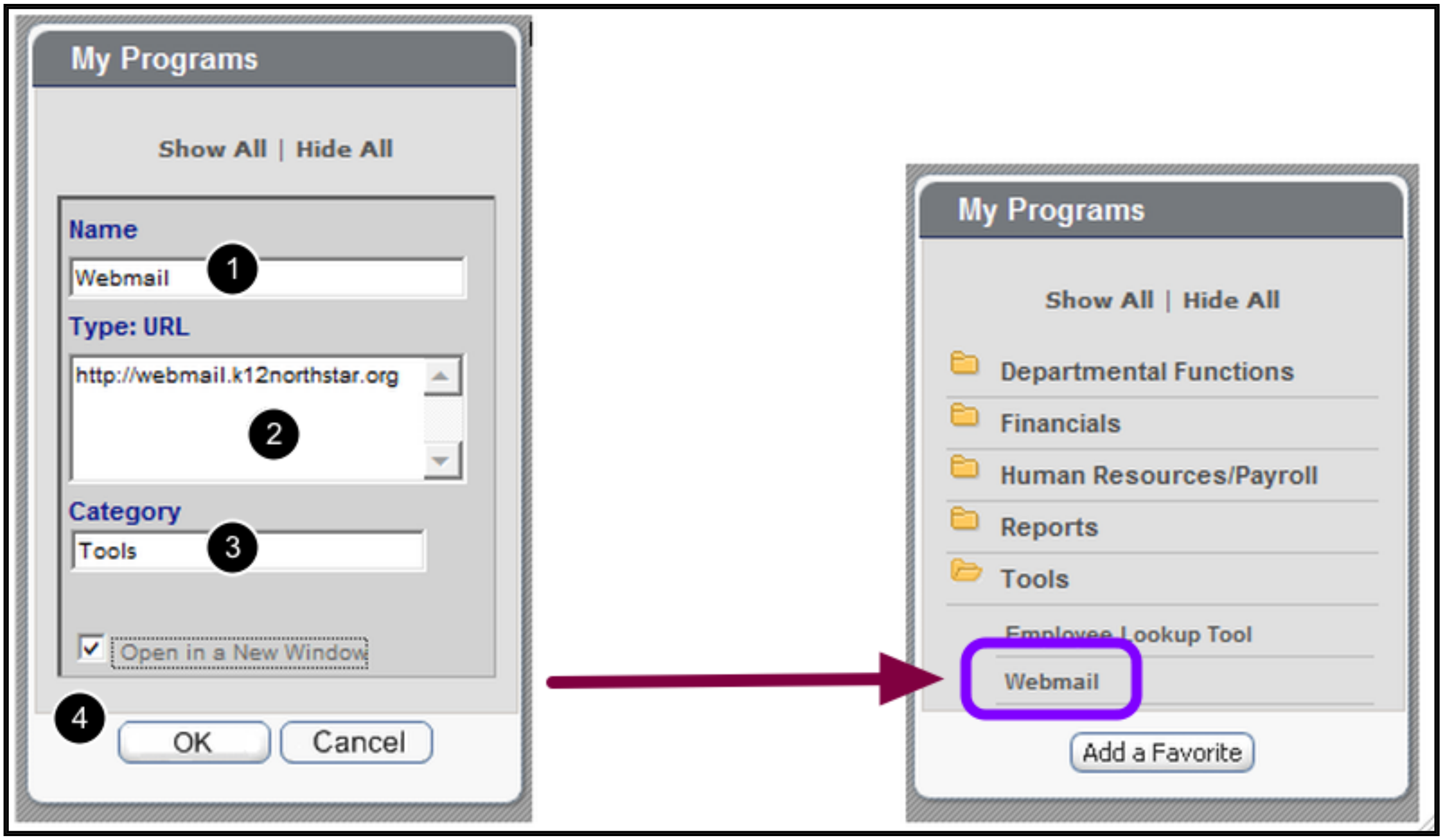
Add this "Favorite" for easy access to your district Webmail while in the Munis terminal server environment.

Log into Munis.



From the Tyler Dashboard, click on the **Add a Favorite** button at the bottom of the **My Programs** block.
Your list under the My Programs headings might look different depending on which favorites you've added or how you've organized them.

Clear the URL that defaults into the page.

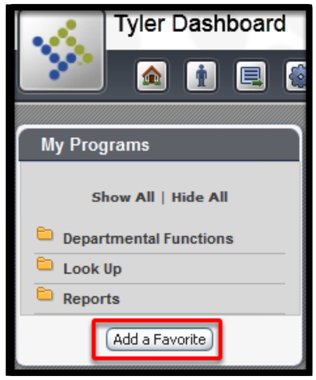


Enter the **Name** and **URL** as shown above. Choose a **Category** (e.g., Tools).
Click the **OK** button. Your screen will revert to the main Tyler Dashboard view.
Click on your newly created **Webmail** favorite. A new tab will open and you can log into your Webmail account.

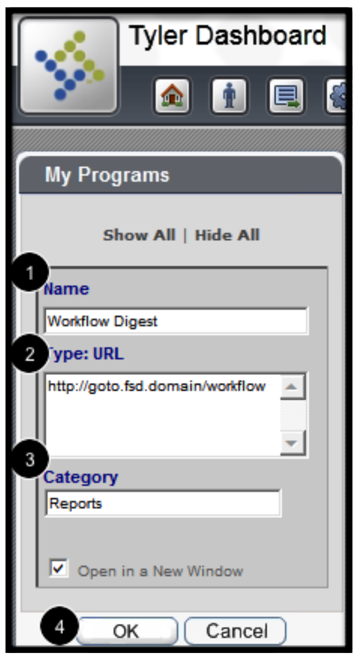
Workflow Action Daily Digest

This tool will generate a list of your actions done on a daily basis and can be printed or exported.

Add a Favorite

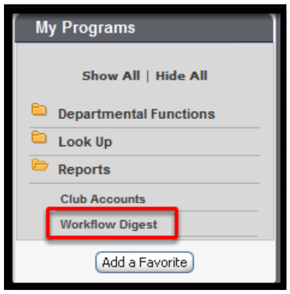


Define a Favorite

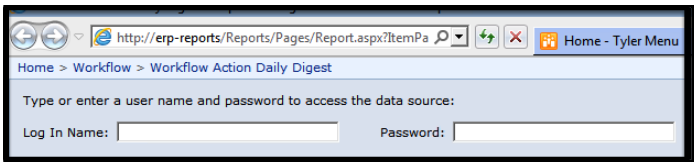


1. Enter a name for the favorite.
2. Enter the url as follows--http://goto.fsd.domain/workflow
3. Choose a category underwhich to file this favorite, or create a new one.
4. Click "OK" to save.

Test out your new tool.

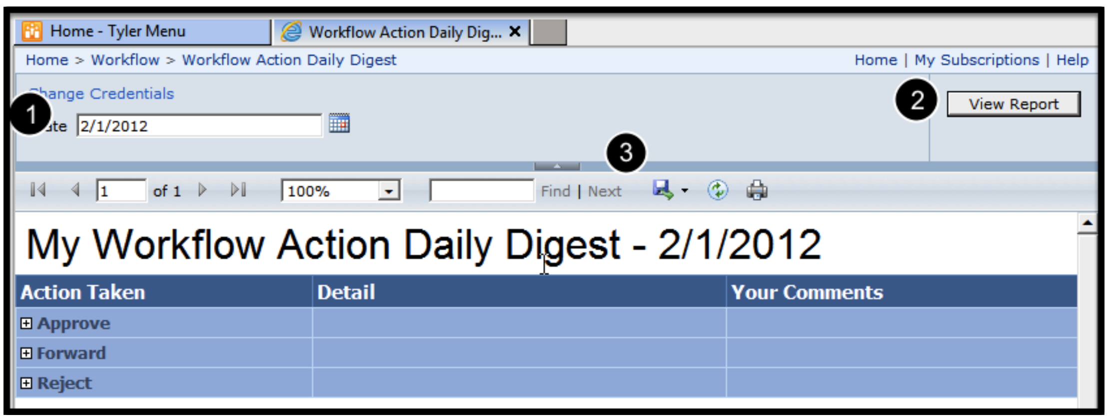


Sign into the Workflow Digest.



Use your "f" number and password.

Test out your new tool.



1. Select the date you would like to view.
2. Click "View Report." When choosing different days, you must click "View Report" to refresh the data. Click on the + to show the actions in that category.
3. You can also export this data into a PDF by clicking the disc. Remember if you choose to save the document, you must save it in your file server folder.